

September 29, 2005

Martha Lynch  
Procurement Manager/Strategic Contracting Centers  
Arizona Department of Administration  
100 N. 15th Avenue, Suite 104  
Phoenix, AZ 85007

Dear Ms. Lynch,

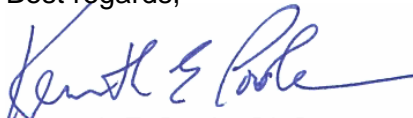
It is with great pleasure that ACCRA in collaboration with its partner consultants provide the enclosed: Proposal to Provide Statewide Research and Survey Services in response to Solicitation No. SCC060001-A1.

In response to this proposal, ACCRA has assembled a uniquely qualified research team composed of experienced economists and policy analysts, including several who have earned their Ph.D. in the fields of applied economics or public policy. The team was assembled to address the unique research needs of Arizona in the areas of (1) general research, (2) strategic business planning and policy development, and (3) economic and financing analysis. The ACCRA team includes a national network of professionals with background in conducting a variety of business and industry surveys, economic, workforce, community and educational development policy research, and implementing impact studies using REMI, IMPLAN, LOCI, ReDyn, and other proprietary impact analysis software packages. Our economists and policy analysts have particular expertise in translating these and other specialized technical studies into ideas and language that can be of greatest use to economic development policy leaders, program managers, and practitioners.

In the proposed effort and in our past work, ACCRA demonstrates its understanding of the importance of balancing the technical capabilities of the research team and translating the results of that research for use in policy making and implementation. Regional economic research and analysis must be relevant to the current policy questions facing the state's leadership.

In the enclosed proposal, we have attempted to organize our capabilities in such a way as to make it easy for representatives of the State of Arizona to quickly assess and relate our skills and abilities to their respective needs. We look forward to discussing this proposed effort with any state agency who is interested in our research experience and capabilities in greater detail. Please call me at 703-522-4980 or email me at [kpoole@accra.org](mailto:kpoole@accra.org) if you have any questions regarding the proposal or our proposed approach. I look forward to talking with you soon.

Best regards,



Kenneth E. Poole, Ph.D.  
Executive Director

ACCRA—The Council for Community and Economic Research

**Proposal to Provide**  
**Statewide Research and Survey Services**  
**Solicitation No. SCC060001-A1**

*Submitted*  
*September 30, 2005*

*To:*  
*Arizona Dept of Administration*  
*Strategic Contracting Centers*

*By:*

**ACCRA**  
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Community And Economic Development*

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## **ACCRA Corporate Experience/Expertise/Reliability**

ACCRA—the Council for Community and Economic Research—is an Arlington, VA-based independent 501(c) 6 non-profit affiliated with the George Mason University School of Public Policy and the Center for Regional Economic Competitiveness (CREC). ACCRA ([www.accra.org](http://www.accra.org)) is organized to promote excellence in research for economic and community development through professional leadership, in-depth research and analysis, as well as education and training. The organization is committed to the highest standards of credibility, reliability, and accuracy in its research. ACCRA is nationally known for producing the quarterly Cost of Living Index and is the only national organization representing community research professionals.

For the past two years, ACCRA has worked closely with the Arizona Department of Commerce and Arizona Economic Development Commission to conduct economic development policy and research projects designed to support the statewide economic development strategies. Our involvement in Arizona's economic development research program includes conducting a benchmark assessment of the state's economic development structure as well as a workforce needs of the state's construction trades industry. Currently, ACCRA is finalizing an assessment of the economic growth opportunities and workforce preparation needs for an emerging solar energy industries cluster in the state. Through our collaboration with the Arizona Department of Commerce, ACCRA has gained invaluable insight, knowledge, and experience with state economic development and public policy concerns.

ACCRA conducts research and technical assistance in support of economic, workforce, community, and technology development across the nation. Working in cooperation with its sister organization, the Center for Regional Economic Competitiveness, ACCRA designs regional economic strategies and conducts local and regional research on industries, clusters, occupations, and educational/training programs. ACCRA staff is currently working on economic development research and policy projects with or on behalf of the National Institute of Standards and Technology, the State Science and Technology Institute, the Upper Rio Grande Workforce Development Board, North Carolina's Eastern Region Partnership, the Future Forward Economic Alliance (western North Carolina), and Aquila Utility.

ACCRA's research and project facilitation involves a variety of quantitative and qualitative research methods. ACCRA is widely known for its quantitative capabilities – conducting economic indexes (including the ACCRA Cost of Living Index), economic and fiscal impact studies, cluster analyses, industry targeting studies, and community profiles. ACCRA staff also has the talent to manage qualitative research including surveys, telephone interviews, one-on-one interviews with high level policy and business leaders, as well as focus group sessions. ACCRA and its affiliate, CREC, have extensive experience in facilitating group discussions and decision making sessions to identify issues, consider policy options, and develop recommended policy solutions for economic, workforce, community, and educational development.

ACCRA staff has also provided a number of presentations to national, state, and local leadership on innovations in regional economic strategies, making presentations to groups such as the Arizona Governor's Rural Development Conference, the State Science and Technology Annual Conference, the California Workforce Association's Meeting of the Minds conference, the Wisconsin Governor's Economic Development Summits as well as many other efforts.

In addition to its research activities, ACCRA designs and implements training for economic development practitioners to help enhance the use of methods and tools for

understanding local economies. ACCRA provides training in practical and proven analytical tools for economic research. We have conducted a series of training courses targeted to economic and fiscal impact analysis, cluster analysis, basic regional economic analysis, competitive company intelligence gathering, geographic information system (GIS) solutions, and industry targeting at a variety of locations across the United States. The organization also offers a professional certification, the Certified Community Researcher, which denotes a mastery of economic and demographic research analysis for practical community research applications. ACCRA's foundation research methods course is now used as a 3-hour credit course for the University of Southern Mississippi's executive format Master's Degree program. Other training activities include a recent curriculum developed in collaboration with the National Association of Workforce Boards and the National Center on Education and the Economy aimed at providing intermediate level training for workforce development leaders on ways to work more closely with economic development. The International Economic Development Council has asked the same team of organizations to collaborate with the Corporation for Skilled Workforce to develop a similar program for economic development leaders.

Joining ACCRA for this proposal is a national team of regional economists and policy analysts with specialties in the fields of economic development, workforce development, community development and higher education. Many of these consultants have worked with ACCRA as trainers, project team members, or partners on related projects. ACCRA brings a national network of technical specialists to the team, many of whom have conducted extensive research on economic and fiscal impacts of tax policies, infrastructure investments, economic development program evaluation, workforce needs assessments, and a wide variety of project impact studies.

### ***Matrix of RFP Requirements and ACCRA Experience***

Combined, these activities represent the array of experience and expertise that the State of Arizona will require to implement successfully future economic research and analysis projects. In this proposed efforts, the ACCRA research team is responding to the general requirements listed in the Scope of Work as Category 3.1- General Research, Category 3.2 – Strategic Business Planning and Policy Development, and Category 3.3 – Economic Analysis and Financing Planning. The following document organizes our experience and expertise in a series of matrices designed to correspond to each of these three Scope of Work Categories. Each matrix lists ACCRA projects that are pertinent to the category and then identifies those projects that are related to the project types as identified within the category. Information about relevant projects and references are provided later in the document. Matrix 1 provides an overview of ACCRA's experience with pertinent General Research project activities. Matrix 2 provides an overview of ACCRA projects related to Strategic Business Planning and Policy Development. Matrix 3 offers examples of ACCRA projects pertaining to Economic Analysis and Financing Planning.

**General Requirements Matrix 1: Experience/Expertise/Reliability Related to  
“Section 3.1 General Research”**

<b>SELECTED ACCRA EXPERIENCE, EXPERTISE, &amp; RELIABILITY</b>	<b>ECONOMIC FISCAL IMPACT RESEARCH (SCOPE OF WORK 3.1.1)</b>	<b>PROGRAM EVALUATION (SOW 3.1.4)</b>	<b>POLICY DEVELOPMENT RESEARCH (SOW 3.1.5)</b>	<b>NEEDS ASSESSMENTS (SOW 3.1.7)</b>	<b>FOCUS GROUPS (SOW 3.1.8)</b>
NC EASTERN REGION, 2005		X		X	X
ISOTHERMAL, 2005		X		X	X
AZ SOLAR INDUSTRIES, 2005			X		
NC FUTURE FORWARD IMPLEMENTATION, 2004- 06	X	X		X	X
AZ CONSTRUCTION TRADES, 2004-05			X		
DURHAM, 2004-05		X			X
BENCHMARKING AZ CEDC, 2004			X		
ROCKY MOUNT, NC 2003-04			X		X
NIST STATE-FED PARTNERSHIP, 2002-06			X	X	X
NIST MANUFACTURING IMPACT, 2003-04	X	X			X
ACCRA INCENTIVES DATABASE, 2004-			X		
LINKING WK & ED IN VA, 2004			X	X	
ROANOKE CLUSTER, 2003-04					X
LANCASTER STRATEGIES, 2003-04		X			X
NCEE ED TRAINING, 2002-05					
NC FUTURE FORWARD STRATEGIES, 2002-04				X	X
ENTREPRENEURSHIP DEV, 2002-03			X		
ROANOKE STRATEGIES, 2002		X			X
ACCRA COLI, 1968-				X	
USM MASTERS IN ECON. DEV., 2004-	X	X	X		

**General Requirements Matrix 2: Experience/Expertise/Reliability to “Section 3.2 Strategic Business Planning and Policy Development**

<b>SELECTED ACCRA EXPERIENCE, EXPERTISE, &amp; RELIABILITY</b>	<b>STRATEGIC PLANNING (SOW 3.2.1)</b>	<b>POLICY FORMULATION &amp; DEVELOPMENT (SOW 3.2.2)</b>	<b>LEGISLATIVE SUPPORT (SOW 3.2.3)</b>	<b>PLANNING FOR ORGANIZATIONS, MUNICIPALITIES, &amp; LOCAL GOV'T (SOW 3.2.4)</b>
NC EASTERN REGION, 2005	X		X	X
ISOTHERMAL, 2005	X		X	X
AZ SOLAR INDUSTRIES, 2005		X		
NC FUTURE FORWARD IMPLEMENTATION, 2004- 06		X	X	X
AZ CONSTRUCTION TRADES, 2004-05		X		
DURHAM, 2004-05	X	X		X
BENCHMARKING AZ CDC, 2004		X		
ROCKY MOUNT, NC 2003-04	X			X
NIST STATE-FED PARTNERSHIP, 2002-06	X	X	X	
NIST MANUFACTURING IMPACT, 2003-04			X	
ACCRA INCENTIVES DATABASE, 2004-		X	X	
LINKING WK & ED IN VA, 2004	X		X	X
ROANOKE CLUSTER, 2003-04		X		X
LANCASTER STRATEGIES, 2003-04	X	X		X
NCEE ED TRAINING, 2002-05		X	X	X
NC FUTURE FORWARD STRATEGIES, 2002-04	X	X	X	X
ENTREPRENEURSHIP DEV, 2002-03		X	X	
ROANOKE STRATEGIES, 2002	X	X	X	X
ACCRA COLI, 1968-				
USM MASTERS IN ECON. DEV., 2004-	X	X		X

**General Requirements Matrix 3: ACCRA's Experience/Expertise to "3.3 Economic Analysis and Financing Planning"**

<b>SELECTED ACCRA EXPERIENCE, EXPERTISE, &amp; RELIABILITY</b>	<b>ECONOMIC FORECASTING AND/OR MODELING (SOW 3.3.4)</b>	<b>ECONOMIC &amp; FISCAL IMPACT ANALYSIS (SOW 3.3.6)</b>	<b>ECONOMIC RESEARCH: ANALYSIS &amp; TRENDS (SOW 3.3.7)</b>
NC EASTERN REGION, 2005	X		X
ISOTHERMAL, 2005			X
AZ SOLAR INDUSTRIES, 2005			X
NC FUTURE FORWARD IMPLEMENTATION, 2004- 06			X
AZ CONSTRUCTION TRADES, 2004-05	X		X
DURHAM, 2004-05	X		X
BENCHMARKING AZ CEDC, 2004			
ROCKY MOUNT, NC 2003-04			
NIST STATE-FED PARTNERSHIP, 2002-06			
NIST MANUFACTURING IMPACT, 2003-04	X	X	X
ACCRA INCENTIVES DATABASE, 2004-			
LINKING WK & ED IN VA, 2004			
ROANOKE CLUSTER, 2003-04	X		X
LANCASTER STRATEGIES, 2003-04			
NCEE ED TRAINING, 2002-05			
NC FUTURE FORWARD STRATEGIES, 2002-04	X	X	X
ENTREPRENEURSHIP DEV, 2002-03			
ROANOKE STRATEGIES, 2002			
ACCRA COLI, 1968-	X		X
USM MASTERS IN ECON. DEV., 2004-		X	

## **Selected ACCRA Contracts/References/Services Performed**

The following pages include a brief description of ACCRA/CREC projects relevant to Arizona's needs. The section is structured to respond to the RFP requirements requesting: (1) a list of related projects identical or similar to the RFP requirements (including a reference to the respective General Requirement Categories and dates performed), (2) references for each of the projects including contact information for individuals who can verify the project information, and (3) information or descriptions related to each project including the services that ACCRA provided. Each of the projects described below was performed within the past five years.

### **North Carolina's Eastern Region Visioning Plan, 2005-2006 (Matrix 1, 2, and 3)**

#### **NORTH CAROLINA'S EASTERN REGION, KINSTON, NC**

*Reference and Contract Contact:*

*Leonard Kulik, Project Manager/Business Analyst, and  
Thompson Greenwood, Executive Director,  
3802 Hwy 58 North, Kinston, NC 28504*

*Phone: 800-474-8499, 252-522-2400*

*E-mail: kulik@nceast.org*

ACCRA/CREC is helping to guide leaders in North Carolina's Eastern Region in targeting their business recruitment, retention, and entrepreneurial development efforts by developing a vision plan for 13 counties. CREC is working with its partner Eva Klein and Associates, Ltd. to gather insights from key stakeholders, analyze existing research, conduct supplemental research, and guide a group for regional leaders through the process. The goals of this project aim at creating consensus on the most critical strategies to address regional issues and developing a regional economic development vision plan designed to create jobs and attract new investment. An important element of this work includes a regional cluster study conducted in collaboration with senior consultant Ed Feser.

### **Isothermal Comprehensive Economic Development Strategy, 2005 (Matrix 1, 2, and 3)**

#### **ISOTHERMAL PLANNING AND DEVELOPMENT COMMISSION, RUTHERFORDTON, NC**

*Reference and Contract Contact:*

*Bill Robertson, Director of Workforce Development, and  
Jim Edwards, Director of Planning and Development  
111 West Court St., Rutherfordton, NC 28139*

*Phone: 828-287-2281*

*E-mail: brobertson@regionc.org or jedwards@regionc.org*

ACCRA helped leaders in four predominantly rural counties west of Charlotte identify strategic economic, community, and workforce development priorities. These counties were strongly impacted by declines in textiles, apparel, and furniture product and they have fewer workers today than a decade ago, even though new people continue to move to the region. The focus of the plan is to find future employment opportunities and help the region transition to a new economic future. Strategies presented relate to improving education and training, infrastructure assets, and creating linkages to key urban centers.

### **Arizona Solar Industries Economic and Labor Demand, 2005 (Matrix 1, 2, and 3)**

#### **ARIZONA DEPARTMENT OF COMMERCE, PHOENIX, AZ**

*Reference and Contract Contact:*

Janet Woolum, Research Director, Arizona Department of Commerce  
1700 W. Washington Street, Suite 600, Phoenix, AZ 85007

Phone: 602-771-1165

E-mail: JanetW@azcommerce.com

ACCRA is helping the Energy Office of Arizona Commerce Department identify economic growth opportunities and workforce development needs for the state's solar energy business cluster. The project included a survey of 170 solar energy industries firms and telephone interviews of industry experts and company executives. The focus of the study is to assess the current economic opportunities and workforce training capacity for the future growth of solar energy industries in Arizona. Policy recommendations include increasing solar technology development and deployment, supporting growth in solar cluster industries, expanding solar energy demand, and ensuring a prepared, skilled workforce.

### **Future Forward Comprehensive Economic Development Strategy Implementation, 2004-06 (Matrix 1, 2, and 3)**

#### **FUTURE FORWARD ECONOMIC ALLIANCE, HICKORY, NC**

*Reference and Contract Contact:*

Mr. Douglas Taylor, Executive Director, Western Piedmont Council of Governments  
736 4<sup>th</sup> Street, SW, Hickory, NC 28602

Phone: 828-322-9191

E-mail: doug.taylor@wpcog.org

ACCRA/CREC was engaged by the Future Forward Economic Alliance Board on an 18-month assignment to help in implementing key elements of their strategic plan. The scope of work under this project includes: helping to complete an industry growth analysis; a brownfields site survey; identifying key developable sites in the region; monitoring and evaluating plan activities; and facilitating board and committee activities. ACCRA/CREC is also charged with helping to facilitate the development of key leadership networks throughout the region. As part of this effort, CREC and related efforts have helped to leverage approximately \$3 million in federal, state, and private funding for projects in the region.

### **Arizona Construction Trades Labor Study, 2004-2005 (Matrix 1, 2, and 3)**

#### **ARIZONA DEPARTMENT OF COMMERCE**

*Reference and Contract Contact:*

Janet Woolum, Research Director and  
Darcy Renfro, Governor's Policy Advisor for Economic Development (former Commerce Assistant Director for Workforce)

1700 W. Washington Street, Suite 600, Phoenix, AZ 85007

Phone: Woolum- 602-771-1165, Renfro - 602-771-1185

E-mail: JanetW@azcommerce.com; DarcyR@azcommerce.com

ACCRA coordinated a survey of more than 1,600 construction trades firms and 55 construction trades apprenticeship and training providers. The staff analyzed occupational projections, skill demands, and training program gaps to help provide recommendations for Arizona's workforce policy. The Arizona Department of Commerce

plans to use the study results to reshape its investment in training and apprenticeship programs statewide.

***Durham Workforce Development Strategy, 2004-2005 (Matrix 1, 2, and 3)***

**DURHAM WORKFORCE DEVELOPMENT BOARD, DURHAM, NC**

*Reference and Contract Contact:*

*Patricia Sturdivant, Director Workforce Development, and Alan DeLisle, Director  
Durham Office of Employment and Economic Development  
101 City Hall Plaza, Durham, NC 27701  
Phone: 919-560-4965  
E-mail: Pat.Sturdivant@durhamnc.gov and alan.delisle@durhamnc.gov*

ACCRA helped leaders in Durham, NC to bridge the gap between long-term unemployment and underemployment in Durham County, NC and job opportunities available in the fast-growing Raleigh-Durham Metro area. The staff identified target growth industries and occupations and determined the skill and related occupational needs of those firms. Durham WDB plans to use the results to shift investments in their federal Workforce Investment Act training programs. The strategy document included research on forecasted occupations, their wage and training needs, and training opportunities.

***Benchmarking the Arizona Commerce and Economic Development Commission, 2004, released July 2005 (Matrix 1 and 2)***

**ARIZONA DEPARTMENT OF COMMERCE, PHOENIX, AZ**

*Reference and Contract Contact:*

*Lisa Danka, Executive Director, Arizona Commerce and Economic Development Commission  
1700 W. Washington Street, Suite 600, Phoenix, AZ 85007  
Phone: 602-771-1165  
E-mail: lisad@azcommerce.com*

ACCRA staff conducted a survey of the budget, governance structure, and incentive policies in 18 competitor states. The staff compared how Arizona's economic, workforce, tourism, and community development efforts are structured as compared with other states. ACCRA proposed a significant expansion in the State's investment in economic development based on a comparison with peer states. The additional investment would help to ensure that Arizona remains competitive. ACCRA also offered several alternatives for governing the agency. Arizona DOC leadership plans to use the study findings in their upcoming budget proposals as the state legislature debates the agency's future.

***Integrating Workforce and Economic Development in a Regional Strategy, 2004 (Matrix 1 and 2)***

**UPPER COASTAL PLAIN WORKFORCE DEVELOPMENT BOARD, ROCKY MOUNT, NC**

*Reference and Contract Contact:*

*Scott Cheney, Senior Advisor, National Association of Workforce Boards  
1701 K Street, NW, Suite 1000, Washington DC 20006  
Phone: 202-775-0906  
E-mail: cheneys@nawb.org*

ACCRA and CREC worked as a subcontractor to the National Association of Workforce Boards to develop a strategic framework for the Region L (Upper Coastal Plain) WDB. The Center provided a one-day training program and co-facilitated two

retreats with the board on how they could move forward in creating an integrated workforce and economic development strategy for the region along I-95 in the “upper coastal plain” region. The Board used NAWB and CREC expertise to design an in-house approach for strategic planning.

***Building A Stronger State-Federal Partnership, 2002-2006 (Matrix 1 and 2)***

**US NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOGY, MANUFACTURING EXTENSION PARTNERSHIP, GAITHERSBURG, MD**

*Reference and Contract Contact:*

*Aimee Dobrzeniecki, Director of Communications, National Institute of Science & Technology, Manufacturing Extension Partnership Program*

*100 Bureau Drive, STOP 4800, Gaithersburg, MD 20899-3460*

*Phone: 301-975-5771*

*E-mail: aimee.dobrzeniecki@nist.gov*

*Dan Berglund, President & CEO, State Science & Technology Institute*

*5015 Pine Creek Drive, Westerville, OH 43081*

*Phone: 614-901-1690*

*E-mail: berglund@ssti.org*

ACCRA/CREC is working in collaboration with several partners including the State Science & Technology Institute to develop a strong support structure for this federal-state partnership program created to help manufacturers become globally competitive. Built on the agricultural extension model already widely known, the US Congress created the National Institute of Standards & Technology Manufacturing Extension Partnership (NIST MEP) in the late 1980s to address the challenges of global competition and to provide access to state-of-the-art knowledge about technical and management techniques that could be applied in small and medium-sized manufacturing facilities.

ACCRA worked with policy makers in Washington and in several state capitals to identify political challenges to the program in the respective state legislatures or executive branches. In addition, ACCRA worked with the staff within not-for-profit manufacturing extension centers across the US to help in developing strategies for communicating the goals and results of manufacturing extension efforts. ACCRA provided strategic advice to NIST MEP, met with key state and national leaders to discuss the program, and provided technical assistance and facilitation support to stakeholders and manufacturing centers in a variety of states, such as Wisconsin, Iowa, Arizona, Alaska, Alabama, Connecticut, Washington, and Texas.

***Assessing the Impact of Manufacturing and the Manufacturing Extension Partnership on the US Economy, 2003-2004 (Matrix 1, 2, and 3)***

**US NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOGY, MANUFACTURING EXTENSION PARTNERSHIP, GAITHERSBURG, MD**

*Reference and Contract Contact:*

*Dr. Elizabeth Clark, State Policy Advisor, National Institute of Science & Technology (retired), Manufacturing Extension Partnership Program (retired)*

*100 Bureau Drive, STOP 4800, Gaithersburg, MD 20899-3460*

*Phone: 301-975-5771*

*E-mail: elizabeth.clark@nist.gov*

ACCRA coordinated a federal-state collaborative research project aimed at analyzing the impacts of manufacturing on the US and selected state economies using

commercially available software. While several commercial and proprietary software packages could be used for this effort, NIST MEP has historically used software produced by Regional Economic Modeling, Inc. (REMI) as a tool to conduct such analyses. ACCRA provided guidance in the research design and in leveraging the in-kind resources from several of its member states across the US who also own a license of REMI Policy Insight® model. The project was designed to answer questions regarding manufacturing's importance to the national/state economy, which industrial sectors are most critical to the economy, and what the impact of the MEP program has had in assisting critical industrial sectors at the national and state levels.

***ACCRA State Incentives Database, 2004-present (Matrix 1 and 2)***

**ACCRA (STATE ECONOMIC DEVELOPMENT RESEARCHERS CHAPTER), ARLINGTON, VA**

*Reference and Contract Contact:*

*Bob Isaacson, Director of Analysis & Evaluation, Minnesota Department of Employment and Economic Development*

*500 Metro Square, 121 7<sup>th</sup> Place East, St. Paul, MN, 55101-2146*

*Phone: 651-297-3615*

*E-mail: bob.isaacson@state.mn.us*

*John Helms, Research Director, Mississippi Development Authority*

*P.O. Box 849, Jackson, MS 39205*

*Phone: 601-359-5762*

*E-mail: jhelms@mississippi.org*

ACCRA has developed a national database of state business incentives with profiles on more than 1400 programs. The database was designed to give economic developers a one-stop resource for comparing incentive programs.

Data provided in the database includes a fully searchable text description of the program as well as other program information. For instance, an economic developer might search for tax credit programs or loans in a neighboring or competitive state for benchmarking purposes. In addition, the database has a number of analytic descriptors designed to classify incentive programs. Users can easily search for economic development incentives by looking at program category (i.e., tax, direct financing, indirect financing), program type (i.e., bonds, grants, insurance, loans, tax credits, tax exemption, etc.), geographic focus (i.e., enterprise, technology or trade zone, etc.), or business needs (i.e., capital access, facility/site location, infrastructure). ACCRA's state economic development research offices are working with ACCRA staff to maintain the database to ensure that it is continuously updated.

***Linking Workforce and Economic Development in Virginia, 2004 (Matrix 1 and 2)***

**NATIONAL CENTER ON EDUCATION AND THE ECONOMY AND  
VIRGINIA WORKFORCE COUNCIL, RICHMOND, VA**

*Reference and Contract Contact:*

*Mark Troppe, Director, Workforce & Economic Development, National Center on Education and the Economy*

*555 13<sup>th</sup> Street, NW, Suite 500 West, Washington DC, 20004*

*Phone: 202-783-3668*

*E-mail: mtroppe@ncee.org*

*Gail Robinson, Virginia Workforce Council Liaison, Virginia Workforce Council  
703 East Main Street, Richmond, VA 23219  
Phone: 804-786-1485  
E-mail: Gail.Robinson@vec.virginia.org*

Under a subcontract to and in close collaboration with the National Center on Education and the Economy, ACCRA conducted a series of videoconferences and in-person presentations to local elected officials throughout Virginia on the role that workforce development resources can play in economic development. The purpose of the project was to engage elected officials in influencing workforce development investments related to training and strategic planning.

***Roanoke Regional Cluster Analysis, 2003-04 (Matrix 1, 2 and 3)  
5<sup>th</sup> Planning District Regional Alliance and the Roanoke Valley-Alleghany Regional Commission, Roanoke, VA***

*Reference and Contract Contact:  
Wayne Strickland, Executive Director, Roanoke Valley-Alleghany Regional Commission  
313 Luck Ave., SW, Roanoke, VA 24016  
Phone: 540-343-4417  
E-mail: wstrickland@rvarc.org*

ACCRA conducted a targeted cluster analysis aimed at identifying existing technology-based clusters in the “NewVA” region, which includes nine cities and counties, including the Roanoke and Blacksburg metropolitan statistical areas (MSA) as well as their surrounding rural counties. Using IMPLAN software, ACCRA’s staff identified trade relationships among key service sectors and created a set of service-oriented benchmark clusters for study. The analysis was being supplemented with a survey of local businesses in a targeted set of technology-oriented clusters. The goal of the exercise was twofold: to help the region better understand its economic base and to identify progress in developing technology-oriented clusters of development. ACCRA worked closely with the Roanoke Valley-Alleghany Regional Commission (RVARC) staff to provide training on how to conduct such analyses in the future.

The study revealed the inter-dependency of the Roanoke and Blacksburg Metropolitan areas with Roanoke serving as the financial and health center of the region while Blacksburg provided emerging new technologies generated from research at Virginia Tech. These historically distinct regions (separated by mountains) had never before examined their economic interactions. The goal of the study is to initiate a dialogue among regional leaders on common challenges and opportunities. This effort was one of the specific tactics to be accomplished as part of a 2002 strategic planning engagement conducted in collaboration with Eva Klein & Associates.

***Lancaster County Economic Development Strategy, 2003-2004 (Matrix 1 and 2)  
ECONOMIC DEVELOPMENT COMPANY OF LANCASTER COUNTY, PA***

*Reference and Contract Contact:  
David Nikoloff, Executive Director, Economic Development Company of Lancaster County  
100 S. Queen St., P.O. Box 1558, Lancaster, PA 17603  
Phone: 717-397-4046  
E-mail: nikoloff@edclancaster.com*

ACCRA/CREC helped county leaders in Lancaster to identify several strategic priorities for action. Lancaster Prospers – the name given to the project – is being

managed through a 36-member planning group representing stakeholders from across the county including government, business, and academia.

The community concluded that it wanted Lancaster to be a national leader in economic innovation and a highly attractive community to the next generation of citizens. In achieving that vision, the county's leadership and citizen identified a number of key values building on the county's unique heritage and its current economic strength. During the process, county leaders embraced economic change and demographic diversity in an environment in which citizens are encouraged to take risks and communities are urged to participate in larger regional initiatives. A critical priority in the county's future is to ensure that its urban areas are revitalized as part of an overall plan to preserve the county's land assets and create appealing places for today's younger workers.

***Economic Development Training for Workforce and Local Elected Leaders, 2002-2005 (Matrix 2)***

**US DEPARTMENT OF LABOR, WORKFORCE EXCELLENCE NETWORK, WASHINGTON DC AND NATIONAL ASSOCIATION OF WORKFORCE BOARDS**

*Reference and Contract Contact:*

*Scott Cheney, Senior Advisor, National Association of Workforce Boards  
1701 K Street, NW, Suite 1000, Washington DC 20006  
Phone: 202-775-0906  
E-mail: cheney@s@nawb.org*

Working on behalf of the US Department of Labor-funded Workforce Excellence Network (WEN), CREC and ACCRA staff worked closely with the National Center on Education and the Economy (NCEE) to design and package a one-day mini-course. The course is designed to integrate economic and workforce development policymaking and programs more effectively. ACCRA contributed by providing organizational expertise and consultation in the design and development of this course and serving as a co-instructor in the delivery of the training in several locations including two training courses for the New Mexico Rural Development Council, the Northern Virginia Workforce Board, the El Paso Chamber of Commerce, the California Workforce Association, and more than 200 elected officials across the Commonwealth of Virginia. ACCRA staff also conducted a training program for additional course instructors allowing for delivery of the program to more than 30 workforce boards in 20 states.

***Future Forward Regional Economic Strategy, 2002-2004 (Matrix 1, 2 and 3)***

**WESTERN PIEDMONT COUNCIL OF GOVERNMENTS, HICKORY, NC**

*Reference and Contract Contact:*

*Mr. Douglas Taylor, Executive Director, Western Piedmont Council of Governments  
736 4<sup>th</sup> Street, SW, Hickory, NC 28602  
Phone: 828-322-9191  
E-mail: doug.taylor@wpcog.org*

ACCRA/CREC served as the lead consultant for a national team involved in developing a comprehensive strategy for a 12-county region in western North Carolina. The project, championed by US Congressman Cass Ballenger of "District 10", examined the economic and cultural challenges facing a region of 800,000 people that is highly dependent on employment in vulnerable manufacturing sectors, including textiles, apparel, furniture, and fiber optic cable. The nine-month project included researchers from Eva Klein & Associates, the University of North Carolina at Charlotte, and the Hudson Institute. The team conducted extensive data analysis, more than 150

interviews, a series of 10 workshops involving more than 400 local leaders, and a series of decisions support meetings with a strategic planning committee. Each of the 12 county commissions adopted a resolution of support for the strategy, and to date 11 of the fiscally hard-hit counties have contributed funding to an alliance of local leaders.

***Promoting Entrepreneurial Development as an Economic Development Strategy, 2002-2003 (Matrix 1 and 2)***

**NATIONAL COMMISSION ON ENTREPRENEURSHIP, WASHINGTON, DC**

*Reference and Contract Contact:*

*Dr. Erik Pages, President, EntreWorks Consulting*

*3407 N. Edison Street, Arlington, VA 22207*

*Phone: 703-237-2506*

*E-mail: epages@entreworks.net*

ACCRA conducted a survey of more than 100 economic development organizations across three states – Maine, Pennsylvania, and Nevada. The purpose of the survey was to identify entrepreneurial development initiatives, attitudes among economic developers about entrepreneurial development as a strategic direction, obstacles to implementing entrepreneurial development, and efforts to evaluate these programs. The survey examined rural and urban initiatives, distinguishing between efforts to promote lifestyle and growth-oriented entrepreneurs.

***Roanoke Regional Strategies, 2002 (Matrix 1 and 2)***

**ROANOKE VALLEY-ALLEGHANY REGIONAL COMMISSION, ROANOKE, VA**

*Reference and Contract Contact:*

*Eva Klein, President, Eva Klein & Associates, Ltd.*

*503 Seneca Road, Great Falls, VA 22066*

*Phone: 703-406-6100*

*E-mail: evaklein@evakleinassociates.com*

*Wayne Strickland, Executive Director, Roanoke Valley-Alleghany Regional Commission  
313 Luck Ave., SW, Roanoke, VA 24016*

*Phone: 540-343-4417*

*E-mail: wstrickland@rvarc.org*

Working under a subcontract with Eva Klein & Associates, ACCRA assisted in developing a Regional Economic Strategy for this 12-county region. The project involved collaborating with public, private, and academic sector stakeholders in interviews and via a 36-member Planning Leadership Group. EKA and ACCRA developed strategies and related tactics and worked to support achievement of “buy-in” of all key players to a unified, focused strategy. Major attention was devoted to the technology economy, the role of Virginia Tech and other academic institutions, transportation and connectivity issues, and entrepreneurship.

The consultants helped local leaders to articulate six strategic themes that serve as a common “song sheet” for all stakeholders. These themes include Visibility, Connectivity, Knowledge Work Force, Entrepreneurship, Industry Clusters, and Quality of Life Amenities. For each of the six themes, the EKA/ACCRA team helped local leaders identify a set of specific goals and tactics. Some of the projects are complex and long-range undertakings. Others are more immediate. Assignments of roles and responsibilities and directions for financing were included in the Strategy.

The leadership group received more than 150 endorsements from local governments and various other entities, and the Regional Economic Strategy is being implemented systematically. Under the Visibility theme, a branding recommendation led to renaming

of the area as “NewVA.” In August 2004, the NewVa leadership group published a report of accomplishments to date. Ongoing accomplishments are still described and organized according to the themes, strategies and tactics as expressed in the EKA and CREC strategy report.

***ACCRA Cost of Living Index, 1968-present (Matrix 1 and 3)***

**ACCRA BOARD OF DIRECTORS, ARLINGTON, VA**

*Reference and Contract Contact:*

*Jeff Blodgett, Vice President of Research, Connecticut Economic Resource Center, and President, ACCRA*

*805 Brook Street, Bldg. 4, Rocky Hill, CT 06067*

*Phone: 860-571-6208*

*E-mail: jblodgett@cerc.com*

Originally titled the Inter-City Cost of Living Indicators Project, the ACCRA Cost of Living Index has been published quarterly since 1968. Working collaboratively with a network of more than 300 state, local, and university researchers across the US, ACCRA produces the Cost of Living Index to provide a useful and reasonably accurate measure of living cost differences among urban areas. Items on which the Index is based have been carefully chosen to reflect the different categories of consumer expenditures. Weights assigned to relative costs are based on government survey data on expenditure patterns for mid-management households. All items are priced in each place at a specified time and according to standardized specifications. The Cost of Living Index is recognized as an authoritative source of cost of living data by the US Census Bureau, CNN Money, and the President’s Council of Economic Advisors, and the index is included in the federal government’s annually published Statistical Abstract of the United States.

***University of Southern Mississippi Executive Format Masters Degree in Economic Development, 2004-present (Matrix 1 and 3)***

**UNIVERSITY OF SOUTHERN MISSISSIPPI, HATTIESBURG, MS**

*Reference and Contract Contact:*

*Judson Edwards, Assistant Professor, and*

*Kenneth Malone, Chair, Department of Economic & Workforce Development*

*118 College Drive #5051, Hattiesburg, MS 39406*

*Phone: 601-266-4736*

*Email: judson.edwards@usm.edu and ken.malone@usm.edu*

In 2004, ACCRA initiated a partnership with the University of Southern Mississippi’s Department of Economic Development to offer an Executive Master’s degree in economic development. Using a non-traditional academic calendar and periodic on-site instruction at locations across the US combined with on-line course support, ACCRA and USM are paving the way for a new model for advanced learning in the fields of economic and workforce development. The first class of 10 students are graduating in 2005 and the second class began in September of the same year. USM is integrating its class work with ACCRA training wherever possible and ACCRA has played an active role in recruiting instructors and designing the material for the entire curriculum.

## ***ACCRA Key Personnel and Senior Consulting Associates Resumes***

This section includes biographical resumes of key personnel available for project activities. The first part of this section includes program professionals who are dedicated ACCRA staff. The second part includes technical and research experts who are available to work with ACCRA as partners on specific projects.

### ***ACCRA Key Staff***

#### ***KENNETH E. POOLE, PH.D., EXECUTIVE DIRECTOR/CEO, ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Kenneth E. Poole is Executive Director of ACCRA and CEO of the Center for Regional Economic Competitiveness (CREC). ACCRA – the Council for Community and Economic Research – is a national non-profit membership organization serving economic and community development researchers in communities, states, academia, and the private sector. Dr. Poole has managed economic development research, analysis, and technical assistance efforts for 21 years. In his capacity of ACCRA's Executive Director, Dr. Poole oversees all program development activities of the organization including its research and professional training activities.

In January 2000, Dr. Poole formed CREC as an independent non-profit affiliated with George Mason University and ACCRA. CREC focuses on developing a stronger understanding of how regional economies can compete effectively in the knowledge-based economy. As CEO of the Center for Regional Economic Competitiveness, Dr. Poole is undertaking organizational development, strategic planning, network building, and technical assistance efforts to foster knowledge-based economic development. Recent projects involved managing a multi-county regional analysis and strategy process for 12 counties in western North Carolina, implementing a county-wide strategic plan for Lancaster County, Pennsylvania, assisting in facilitating a regional economic strategy for a multi-county region in western Virginia, and developing an operating plan for community-based development organizations on Long Island and Brooklyn.

Dr. Poole is currently working with the Arizona Department of Commerce on a workforce needs assessment of the state's burgeoning solar energy industries, as well as facilitating the development of a Vision Plan for North Carolina's Eastern Region Partnership. He is also working with the State Science and Technology Institute (SSTI) to develop a stronger relationship between federal and state partners in the NIST Manufacturing Extension Partnership program. Dr. Poole speaks frequently to national and statewide audiences of local leaders and economic development professionals. He also works with the National Center on Education and the Economy and the National Association of Workforce Boards to develop a training program focused on bringing economic and workforce development policy leaders together, presenting the course in several venues across the country from Washington, DC to Monterey, CA. He was also the lead consultant in developing a workforce development strategy for the Durham, NC, Workforce Board, recently completed a benchmarking study of state economic development organizations, coordinated the development of a national database of more than 1400 state incentive programs, and conducted an analysis of the construction trades industry in Arizona.

Before joining ACCRA in 2000, he served 6 years as the Director of Domestic Economic Development for the National Association of State Development Agencies. In that capacity, he provided technical assistance and research support to state and local

economic development professionals across the US. He developed new project opportunities in technology-based economic development, economic and policy research, and the organization of state-based economic development initiatives. For instance, one project involved a 1999 study of program evaluation activities being implemented by more than 900 state economic development initiatives for the US Economic Development Administration. Another involved managing a study of high technology and manufacturing in the State of Alabama and developing the program operating procedures for a new state-sponsored applied industry research program. Before joining NASDA, Dr. Poole served 8 years as Director of Technical Assistance and Research for the National Council for Urban Economic Development (now, the International Economic Development Council), managing all publications and technical assistance activities in more than 40 communities across the US.

On behalf of ACCRA, Dr. Poole oversees an on-going national data collection effort, the ACCRA Cost of Living Index and training programs for economic development practitioners, including a national training institute at George Mason University. Dr. Poole also teaches and coordinates training offerings related to impact analysis, research design methods, cluster analysis, benchmarking, targeting, and other regional economic analyses targeted to economic developers.

Dr. Poole holds a Ph.D. in Regional Development Policy from George Mason University, a Masters in Public Administration (MPA) from The American University, and a B.A. in Political Science and Psychology from the University of North Carolina at Chapel Hill.

***POFEN LIN SALEM, PH.D., PROJECT MANAGER,  
ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Pofen Lin Salem is a project manager at ACCRA and the Center for Regional Economic Competitiveness. Dr. Salem is experienced in the research and analysis of economic development policy and programs at the state and local levels, especially in the areas of business investment and incentives, technology development, strategic planning, international trade, public-private partnership, evaluation and performance measurement of economic development activities. In her role with ACCRA/CREC, Dr. Salem completed two major research projects in Arizona – one is a benchmarking study of the governance of the Arizona Department of Commerce (AZ DOC) and the other is the assessment of construction trades industry training and apprenticeship programs offered by the AZ DOC's workforce development office. She currently is also leading a research project to identify economic growth opportunities and workforce needs for Arizona's solar energy clusters for the AZ DOC's Energy Office.

Prior to joining ACCRA/CREC, Dr. Salem served as the Director of Research and Economic Development for the National Association of State Development Agencies (NASDA), where she worked with federal agencies and state and local economic development organizations in various business development, technology development, and export promotion projects. She oversaw and managed all research activities for the organization and provided technical and research support to local and state economic development professionals. Among her research projects was the assessment of the performance of economic development programs in Oregon, Michigan and Louisiana; the development of strategic plans for economic development efforts in North Dakota; and an evaluation of the strategic linkages between high technology and manufacturing firms in Alabama. She also directed a national data collection effort on state business investment and incentives.

A regional economic analyst by training, Dr. Salem has worked with local communities and economic development groups on a wide range of regional economic strategies and development plans, including economic impact assessment, urban growth management, tourism development and promotion, and rural economic development. She worked with local county governments in Oregon and Washington states to evaluate the impact of the tourism industry on the regional economy, where she surveyed more than 4,000 local residents and government officials on their attitudes toward the local tourism development policy. She has also researched the impact of international business on the Washington metropolitan economy. In addition, Dr. Salem has more than five years of international business practice in the private sector, and has done extensive research on international trade and urban development. At NASDA, she also managed a federally sponsored environmental technology transfer program aimed at promoting export opportunities between U.S. and Asian small businesses.

Dr. Salem holds a Ph.D. in Regional Economic Development and Urban Management from George Mason University, a Masters in Urban and Regional Planning from the University of Oregon, and a B.A. in Political Science from the National Cheng-Chi University in Taiwan.

***MARK C. WHITE, PH.D., PROJECT MANAGER,  
ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Mark White is research project manager at ACCRA and the Center for Regional Economic Competitiveness. He joined ACCRA and the Center in August 2004 to manage special projects. This includes coordinating research and technical assistance projects on behalf of North Carolina Eastern Region Partnership, western North Carolina's Future Forward Economic Alliance and the Durham, NC, workforce development board. Dr. White recently completed a study of assessing workforce needs for construction trades industry on behalf of the AZ DOC's workforce development office, and is currently conducting a research project on labor demand and workforce training for Arizona's solar industries. He also helped to draft a workforce needs assessment for Durham, NC, and is also assisting in the formulation of a Vision Plan for North Carolina's Eastern Region Partnership. He also coordinates ACCRA's research and training programs.

Before joining the ACCRA and the Center, Dr. White served for two years as a post-doctoral research fellow at the National University of Ireland's Centre for Innovation and Structural Change (CISC) in Galway. In that position, he conducted qualitative and quantitative research to assess the regional development consequences of foreign direct investment, particularly as related to investment in internationally-traded services. This research has been published in peer-reviewed journals in the field of regional development and economic geography such as *Environment and Planning A*, *European Urban and Regional Studies* and *European Planning Studies*.

In the process of completing his doctoral work, Dr. White served as an instructor in World Geography and a GIS/Cartographer at the University of Miami (FL). He also served as a business research intern for the Beacon Council—Miami-Dade County's primary economic development organization. He is also a member of the Association of American Geographers.

Dr. White earned his Ph.D. in International Studies with a focus on economic development from the University of Miami (FL), his M.A. in Geography from the Maxwell School Of Citizenship and Public Affairs, Syracuse University, and his B.A. in Geography at the State University of New York at Plattsburgh.

***EROL YILDIRIM, RESEARCH MANAGER,  
ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Erol Yildirim is a project manager for ACCRA and the Center for Regional Economic Competitiveness. He is a regional economist and also oversees the Center's web development efforts and has primary responsibility for coordinating and compiling the ACCRA Cost of Living Index (COLI), which is a quarterly data collection effort involving about 300 researchers from among ACCRA's membership of chambers of commerce, economic development organizations, academic institutions, and regional planning councils.

The COLI has been published for 38 years, and Mr. Yildirim coordinates interaction with volunteer data providers from nearly 400 communities, responds to issues raised by subscribers, and manages media inquiries, and staffs a technical advisory board consisting of eminent economists from the federal government and academia. His primary focus in coordinating the COLI is aimed at improving the quality of data gathered, expanding the coverage of urban places participating, and in developing new product spin-offs from the standard COLI product.

Mr. Yildirim also designs online surveys customized to individual clients' needs, analyzing the results in a statistical summary. Among his recent accomplishments include the redesign of ACCRA's membership area, the development of an e-commerce site for ACCRA, and the creation of a national searchable database structure for the ACCRA State Incentives Database. Mr. Yildirim serves as the Webmaster, designing and maintaining the websites for ACCRA, COLI, CREC and Future-Forward. In addition, he participates in other consulting engagements, and supports the ACCRA training and educational program.

Before joining ACCRA, Erol Yildirim worked as a Business Manager at Mason Enterprise Center, Mentor Protégé Program. He supported a Department of Defense program and served as a vehicle and catalyst for building long term business relationships between major DOD contractors and small disadvantaged businesses.

Erol Yildirim holds a M.A. in Economics from George Mason University. His specialties are Public Finance and Monetary Economics. He also holds a M.A. from Fairleigh Dickinson University in Financial Economics. Erol Yildirim has practical and educational experience in information systems. His programming skills include Visual Basic, Oracle PL/SQL, and ASP. He is completing his class work toward a doctorate in experimental economics.

***JULIE ALLARDYCE, RESEARCH ANALYST  
ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Julie Allardyce serves as research analyst for ACCRA and the Center for Regional Economic Competitiveness. Her duties include providing research and project assistance for a variety of programs, including data analysis and review for the ACCRA Cost of Living Index. She also manages the ACCRA's State Business Incentives Database (developed with support from five state economic development organizations including the Arizona Department of Commerce), and aids in the implementation of ACCRA training programs and marketing efforts and edits the monthly ACCRA newsletter.

Prior to joining ACCRA and CREC, she worked for the National Telecommunications Cooperative Association performing survey and marketing duties for educational programming, and as a Marketing Specialist for Track Marketing Group, Inc.

Ms. Allardyce received a Bachelors of Liberal Science degree, majoring in Business Administration from Mary Washington College, and a Masters in Business Administration from Averett College.

***SIOBHAN PERKINS, RESEARCH ASSISTANT***

***ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Siobhan Perkins serves as a research assistant for the Center for Regional Economic Competitiveness. She provides support for the ACCRA Cost of Living Index and coordinates ACCRA's membership services activities. She has assisted ACCRA/CREC in implementing survey data collection and managing the logistics of several ACCRA surveys of business leaders, community college officials, and economic development practitioners.

Ms. Perkins expects to earn BA in International Affairs with a concentration in International Development in December 2006.

***SEAN McNAMARA, ADMINISTRATIVE DIRECTOR/CHIEF OPERATING OFFICER***

***ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Sean McNamara is administrative director for ACCRA and chief operating officer for the Center for Regional Economic Competitiveness. In 2000, Sean McNamara helped to form the CREC as an independent non-profit affiliated with George Mason University and ACCRA that is focused on developing a stronger understanding of how regional economies can compete effectively in the knowledge-based economy.

As part of those efforts, Mr. McNamara oversees the day-to-day logistics of both CREC and ACCRA – a national nonprofit membership organization serving economic and community development researchers in communities, states, academia, and the private sector. In this capacity of Administrative Director, Mr. McNamara supervises the implementation of all program development activities including: Board relations, corporate finances, office management and technology infrastructure and human resource aspects of the organization.

As COO of the Center for Regional Economic Competitiveness, Mr. McNamara supports the CEO in maintaining the strategic elements of CREC with its partners and network, while also implementing the administrative support functions for the organization. Mr. McNamara helps in organizing conferences, coordinating interviews, and troubleshooting critical issues.

Before joining CREC and ACCRA in 2000, Mr. McNamara served as the CEO of McNamara Associates, a management consulting organization where he provided research, facilitation, project coordination, and management assistance to several state and local economic development association clients including the American Association of Enterprise Zones (AAEZ), The National Association of State Development Agencies (NASDA), and the National Council of Urban Economic Development (CUED, now IEDC). That effort included conducting research, producing newsletters and technical assistance reports, and data analysis, including the development of a national database of incentives and the publication of case studies outlining the successes of state enterprise zones and federal empowerment zones/enterprise communities. Mr. McNamara's efforts also included maintaining project schedules, organizing national conferences, and supporting client organizations' efforts in data collection and dissemination. Among the conferences he organized included the coordination with then-Vice President Al Gore's office as a keynote speaker for the 1996 AAEZ annual conference.

During his career, Mr. McNamara's efforts have focused on a wide variety of topics including state and local economic development management approaches, economic development program design and evaluation as well as federal programs to promote economic development, enterprise zones, and community development impact issues.

Before transitioning into economic development, Mr. McNamara gained 15 years experience in residential and commercial design. He served as senior project manager for Ryland Homes, a national home construction firm, managing their home accessories design stores, and held a number of positions with commercial/home design and home furnishings firms.

Mr. McNamara earned both a Masters and baccalaureate in Fine Arts from the Rhode Island School of Design.

***DENISE M. BOSMANS, DIRECTOR, MARKETING AND COMMUNICATIONS  
ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Denise M. Bosmans rejoined the Center for Regional Economic Competitiveness (CREC) as Director of Marketing and Communications in September 2005. Her responsibilities include overseeing all media relations, promotional activities, and sponsorship development for CREC and its sister organization, ACCRA. Before joining CREC, she spent a year with Madden Preprint Media, an advertising and marketing firm specializing in state and local tourism promotion. She managed the company's northeast Atlantic territory.

Ms. Bosmans previously served as project consultant for CREC from late 2002 to 2004, providing assistance in organizing the agenda for two ACCRA Annual conferences and providing marketing assistance to ACCRA and the Center. Ms. Bosmans took on additional responsibilities in helping to implementing a CREC national technical assistance program for the US National Institutes of Standards and Technology Manufacturing Extension Partnership (NIST MEP). She was responsible for tracking project activities as well as for organizing and participating in meetings with senior economic development staff from states, universities, colleges, and local leaders.

Ms. Bosmans has more than twenty years of experience working with federal, state and local economic development officials. She has organized meetings, conferences, workshops and training programs in numerous development areas, including: enterprise zones; economic development in certified cities; minority business development; job training; travel and tourism development; international trade and development; and export financing. She has served as the lead in planning, organizing and supervising all major national and regional training programs and conferences. She served for two decades as the manager of membership services for the National Association of State Development Agencies (NASDA). She also served as principal liaison with its private sector members and staffed several NASDA division programs. At NASDA, Ms. Bosmans helped to design and implement economic development partnership training for state and local officials. She also successfully solicited more than \$100,000 in free advertising for the Directory of Incentives: A State by State Guide. She handled the production and marketing for most of the economic development publications, and recently started productions of all publications on compact disk.

Ms. Bosmans was the project coordinator for NASDA's participation and co-sponsorship of three national conferences on infrastructure issues. The conferences, entitled "Rebuild America" were conducted primarily by Forbes magazine, with numerous private and public cosponsors. NASDA was the principal public sector cosponsor. Ms. Bosmans was the co-founder of the Travel and Tourism Development Division, created specifically to address the potential for job creation and community

revitalization. Ms. Bosmans has worked with numerous national and regional organizations to conduct over nine successful national tourism conferences that attracted state, local and federal officials, from both tourism and economic development agencies. She organized the first training program for travel and tourism development officials in conjunction with George Washington University.

In 2002, Ms. Bosmans organized an exclusive bi-annual international forum in Venice, Italy designed for executives at the most senior level in the oil and gas industry. Before joining CREC, she served for a time as an independent consultant where she focused her efforts on sales and marketing, strategic planning, and event planning/management. Among others, her clients included the Massachusetts Commonwealth Corporation, Forbes and Forbes Global, The Petroleum Finance Company, and the Virginia Economic Development Partnership.

### **ACCRA Senior Project Consulting Associates**

ACCRA continuously collaborates with project consultants and partners. Following are several consultants that have worked with ACCRA and are frequently available to work on project engagements. ACCRA calls upon these consultants based on the project content and their availability.

Consultant	Sample Area of Expertise
<b>Public Policy</b>	
ELIZABETH BUTLER	POLICY RESEARCH; WORKFORCE DEVELOPMENT; HOUSING AND COMMUNITY DEVELOPMENT PLANNING
SCOTT JACKSON	POLICY RESEARCH; TECHNOLOGY TRANSFER; BUSINESS REGULATORY ISSUES
EVA KLEIN	HIGHER EDUCATION AND ECONOMIC DEVELOPMENT; REGIONAL STRATEGY; LEADERSHIP FACILITATION
ERIK PAGES, PH.D.	ENTREPRENEURIAL DEVELOPMENT; REGIONAL STRATEGY FACILITATION
ROGER STOUGH, PH.D.	REGIONAL ECONOMIC ANALYSIS; TRANSPORTATION PLANNING
<b>Economic Impact and Financial Analysis</b>	
TERRY CLOWER, PH.D.	ECONOMIC IMPACT ANALYSIS; REGIONAL ECONOMIC ANALYSIS
EDWARD FESER, PH.D.	REGIONAL ECONOMIC ANALYSIS; CLUSTERS ANALYSIS; ECONOMIC DEVELOPMENT POLICY
ROBERT LANN	COST-BENEFIT ANALYSIS; ECONOMIC IMPACT ANALYSIS
ALFIE MEEK, PH.D.	ECONOMIC IMPACT ANALYSIS; ECONOMIC MODELING
AL PARISH, PH.D.	REGIONAL ECONOMIC FORECASTING; ECONOMIC IMPACT ANALYSIS
STAN PROVUS	BUSINESS AND COMMUNITY FINANCING
WILLIAM RIAL, PH.D.	ECONOMIC IMPACT ANALYSIS
TOBY RITTNER	BUSINESS AND COMMUNITY FINANCING
KEITH SCHWER, PH.D.	ECONOMIC IMPACT ANALYSIS; ECONOMIC MODELING
TOM TANNER, PH.D.	RESEARCH ECONOMICS; LOCAL FORECASTING AND DATA; ECONOMIC IMPACT ANALYSIS

***ELIZABETH BUTLER, RESEARCH CONSULTANT***  
***ACCRA/CENTER FOR REGIONAL ECONOMIC COMPETITIVENESS***

Elizabeth Butler is a research consultant for the Center for Regional Economic Competitiveness and also an independent contractor. She served as a research analyst for the Center on the recent strategic plan for the Future Forward Economic Alliance (representing a 12-county area of western North Carolina). In that position, she analyzed the workforce needs and education/training capacity in the region that includes Hickory, Boone, and Statesville.

Ms. Butler's other work includes providing training, technical assistance, advice and guidance to national and local, public and private economic development organizations. Her efforts have specialized in strategic planning and workforce development issues associated with overcoming the digital divide, building corporate/community partnerships, enhancing programs designed youth and young adults, as well as consulting on resource and organizational development for community organizations.

Prior to 2002, Ms. Butler held several positions at the National Congress for Community Economic Development, a trade association for the community economic development organizations, including Special Projects Director and Resource Development Officer. In these positions, Ms. Butler developed and administered partnerships, policy, programs and resources to promote and facilitate business and economic development activities of community development corporations. She served as an advisor to the organization's President on policy, administration and finance/investment initiatives. She managed implementation of special projects such as franchise, equity, retail development and securitization initiatives. She also served as the primary liaison to Federal, private and non-profit partners.

Before joining NCCED, Ms. Butler was an economic development program and policy specialist at the US Department of Housing and Urban Development. At HUD, she administered three discretionary grant programs including the development of regulations, notices of funding availability, application review processes and procedures, contracts, financial management, reviewer training and other tasks. During her tenure, she was detailed to Treasury Department's Community Development Financial Institutions (CDFI) Fund.

Ms. Butler is an experienced facilitator with broad knowledge of economic development strategies conducted at national and local levels. Her specialties include strategic planning and workforce development. She holds a Masters in Public Administration in Urban Policy from the George Washington University and Bachelors in Economics and English from the University of Vermont.

***SCOTT JACKSON, RESEARCH CONSULTANT***  
***ACCRA AND GEORGE MASON UNIVERSITY, FAIRFAX, VA***

Scott Jackson is an independent research consultant to ACCRA and a PhD student and researcher at George Mason University studying technology-based economic development policy. Before beginning his career at George Mason University in 2005, Mr. Jackson was Manager of Market Analysis and Economic Development for Development Concepts, Incorporated in Indianapolis, Indiana – a planning and community development consulting firm. In this role, he provided market analysis and economic development expertise for projects ranging from downtown revitalization plans for medium and small sized communities (e.g. Columbus, Indiana) to specific community development projects. This later research often included assembling research on private and public sector financing opportunities available to communities to activate the market and facilitate development initiatives.

Mr. Jackson was also the owner of a small policy consulting firm, Pilgrim Research, in Indianapolis which performed policy and financial analysis and logistical support for the Indiana Center for Cultural Exchange, the Indiana State Museum and Historic Sites and engaged in the campaign and transition activities of Indiana Governor Mitch Daniels.

Before moving into economic development, Mr. Jackson worked in the environmental testing and pharmaceutical industries for 12 years as a chemist and a pharmaceutical regulatory affairs officer. Mr. Jackson was an analytical chemist with Waste Management Incorporated in their Geneva, Illinois, Environmental Monitoring Laboratories and a Group Leader in the Quality Control Labs of Eli Lilly and Company.

While at Lilly, he was the acting President of the International Forum and rotated from the quality labs to pharmaceutical sales and then to international regulatory affairs. In his role in regulatory affairs, Mr. Jackson was responsible for the company's regulatory activities in about 30 countries across Africa and the Middle East for more than 60 products. He eventually assumed oversight responsibilities for regulatory systems implementation in more than 60 countries from Russia to South Africa. He became the company's expert on international registration planning, and was a frequent contributor to policy responses on issues of international trade.

In addition to his oversight responsibilities, Mr. Jackson was also responsible for training and development of local regulatory personnel and convened various technical groups within Lilly and international regulatory personnel – patents, trademarks, labeling, production. He was also a technical advisor for Africa with the Association of British Pharmaceuticals Africa Working Group in Geneva, Switzerland. Some of Mr. Jackson's accomplishments in this period included conducting international regulatory and systems training courses in Switzerland, the UK, and Austria; presenting at annual meetings in Switzerland, Austria, Italy and the UK, and conducting frequent consulting and auditing trips to Saudi Arabia, the United Arab Emirates, Lebanon, Israel, Morocco, Tunisia, Algeria, Kenya, Ivory Coast and South Africa. He served as team leader and principle author of several training programs for international regulatory personnel; coordinated international meetings in Florence, Italy, and Indianapolis, Indiana, and was a primary contributor to an internal company journal, "The Global Marketplace." More recently, Mr. Jackson co-authored "*The Indiana University Advanced Research Technology Institute: A Case Study*," Journal of Technology Transfer, which highlighted the barriers to transferring intellectual property between public institutions and the private sector.

Mr. Jackson holds a B.S. in Chemistry from the University of Evansville, and an MPA in Economic Development and Comparative International Affairs from Indiana University.

#### ***EVA KLEIN, SENIOR PROJECT CONSULTANT***

##### ***PRESIDENT, EVA KLEIN & ASSOCIATES, LTD., MCLEAN, VA***

Ms. Eva Klein, president of Eva Klein & Associates, Ltd., has 32 years of experience in universities and not-for-profit entities. She is known as an expert in strategic management, planning, facilities, and financing for higher education, a creative facilitator in strategic planning that integrates higher education with state and local economic development policy, as well as an international leader in defining strategies for knowledge-based economic development.

Ms. Klein's clients for research parks, incubators, technology development and economic development studies include research universities, local governments, and economic development agencies in the US and abroad. She has also conducted numerous studies of higher education governance, planning, and needs assessments. Among her recent projects include collaboration with CREC in the development of regional strategies for the Future Forward (western North Carolina surrounding Hickory),

North Carolina's Eastern Region (13 counties that include Greenville, NC), and a plan for Virginia's 5th Planning District (surrounding Roanoke) regional economic strategies.

Ms. Klein's entire career has centered on higher education strategy, management, and finance—in consulting, investment banking, and university administration. Among her recent accomplishments include assessing the feasibility and implement research parks and similar collaborations in several states including Oklahoma, Louisiana, Missouri, and other states. She also helped to devise a statewide higher education strategy for North Carolina's university system to support a successful \$3 billion education bond referendum. Prior to forming EKA in 1990, she was vice president for corporate development of College Construction Loan Insurance Association (Connie Lee)—a subsidiary of Sallie Mae, where she was responsible for marketing/liaison activities with higher education institutions. Ms. Klein also served as vice president/group manager of higher education finance at Chemical Securities, Inc. where she was responsible for public finance services for university and not-for-profit clients. Prior to joining Chemical, she was senior manager in the Higher Education Consulting Group of KPMG Peat Marwick (NYC). Earlier, she served for eight years in the administration at The American University (Washington, DC) as founding director of the Cooperative Education Program and as executive assistant to the president and provost.

Ms. Klein has served on the board of directors of the Association of University Research Parks and the Council for Urban Economic Development (now the International Economic Development Council). She also speaks widely on a variety of higher education, technology transfer, and economic development organizations. Her publication topics include strategic planning, marketing, capital finance, research parks/incubators, commercialization of university research, real estate asset utilization, and the roles of higher education in knowledge-based economic development. She authored "Debt Financing and Management" for NACUBO's College and University Business Administration (5th and 6th editions). She contributed "Technology Parks and Incubators: A Nexus Between University Research and Industrial Research and Development," widely regarded as the most authoritative piece ever published on this subject, to *Innovative Models for University Research* (Haden & Brink, Elsevier 1992).

Ms. Klein's earned degrees include: MBA-Strategic Planning and Finance (Wharton School, University of Pennsylvania); MA-French (New York University/The University of Paris-Sorbonne); MS-Education (Graduate School of Education, University of Pennsylvania); and BA-Liberal Arts/French (Douglass College, Rutgers University). Ms. Klein is fluent in French and speaks some Hungarian, Russian, and Spanish.

***ERIK PAGES, PH.D., SENIOR PROJECT CONSULTANT***  
***PRESIDENT, ENTREWORKS CONSULTING, ARLINGTON, VA***

Dr. Erik R. Pages is a senior fellow with the Center for Regional Economic Competitiveness and operates his own independent consulting firm EntreWorks Consulting. Dr. Pages' helps communities and organizations achieve their entrepreneurial potential in economic development. He recently served as a senior consultant to CREC in the development of the *Lancaster Prospers* county-wide economic strategy in Lancaster, PA. Dr. Pages also co-authored with Dr. Ken Poole of CREC in the study of entrepreneurial development efforts within economic development organizations in three states – Pennsylvania, Nevada, and Maine.

In this role, he has collaborated extensively with economic developers and community college leaders in North Carolina and throughout the US. As a lead consultant for the North Carolina Rural Development Center, he helped design the program for the new Institute for Rural Entrepreneurship and the statewide Business

Resource Alliance, a coalition of the state's leading business support service providers. In addition, he also leads a US Department of Education-funded project to develop new tools that link entrepreneurship training and business cluster development. He has also served as a trainer for leading organizations including ACCRA, the National Association of Workforce Boards, International Economic Development Council, the Association of Small Business Development Centers, the National Business Incubation Association, and many others.

He previously served as Policy Director for the National Commission on Entrepreneurship (NCOE), where he directed the Commission's research and policy operations. He also led NCOE's programs to assist communities in developing and implementing their own entrepreneurial development initiatives.

Before joining the Commission, he served as Vice President for Policy and Programs at Business Executives for National Security (BENS). In this position, he helped start and also served as Staff Director of the BENS Tail-to-Tooth Commission, a blue ribbon panel of business leaders promoting management reform at the Pentagon.

Dr. Pages has also held several positions in government---as the first Director of the Office of Economic Conversion Information (OECI) at the U.S. Department of Commerce's Economic Development Administration (EDA). In this position, he helped lead efforts to assist communities affected by military base closings and defense plant shutdowns. He has also worked on Capitol Hill as Legislative Director for former U.S. Representative Gus Yatron of Pennsylvania.

Dr. Pages has served as a consultant to trade associations, non-profit organizations and government agencies, and was an official advisor to the White House Conference on Small Business. He has testified before Congress on numerous occasions, and several major foundations have funded his work. In addition, he has received several prestigious awards including selection as one of 24 national "Next Generation Leaders" by the Rockefeller Foundation in 1998.

He received his Ph.D. from Georgetown University, where he now serves as an Adjunct Professor. He is a graduate of Dickinson College (Phi Beta Kappa) and the University of Pittsburgh's Graduate School of Public and International Affairs. He has written and published widely on business trends, economic development, technology policy, and national security policy. His publications include the book, *Responding to Defense Dependence*, and numerous reports, journal articles and book chapters. A native of Reading, PA, he now resides with his family in Arlington, VA.

***ROGER STOUGH, PH.D., SENIOR PROJECT CONSULTANT***

***ASSOCIATE DEAN, SCHOOL OF PUBLIC POLICY, GEORGE MASON UNIVERSITY,  
FAIRFAX, VA***

Roger Stough's areas of expertise include Regional Economic Development Analysis; Policy, Transportation Analysis and Policy; and Entrepreneurship and Regional Economic Development. Dr. Stough has an extensive publication record, including several hundred scholarly and professional publications, 12 books and nearly 100 journal articles. Dr. Stough also has a wide range of graduate and undergraduate teaching experience, with over 30 years logged in eight separate institutions (including Johns Hopkins University, University of South Carolina, Indiana University, Leiden and Erasmus Universities in the Netherlands, as well as George Mason University). He has extensive experience engaging the University community with the local, state, regional, national leaders. He chairs a number of task forces, and advises a wide range of external programs and university policy boards.

Dr. Stough is the principal investigator on numerous grants and contracts totaling more than \$50,000,000 from the U.S. Department of Transportation, the Research and Special Projects Administration (USDOT), the Federal Highway Administration, the Federal Transit Administration, the National Technology Information Administration, NASA, U.S. Department of Justice, Virginia's Center for Innovative Technology, the National Science Foundation, and numerous state and local agencies. While the local National Capital Region is an empirical laboratory for much of his research, he has extensive research and consulting experience nationally and internationally. He has participated in technology policy seminars and university programs and published widely in Asia, Europe and North America.

Furthermore, Dr. Stough has established a diversity of research, student and faculty research exchange programs with universities and research laboratories in Asia, Europe and Australia. Finally, he founded and directed various degree programs (from the undergraduate to the Ph.D. level) and several research centers. All of these programs and centers are still operating and have continued to grow. He edits two journals and his most recent book with Robert Stimson and Brian Roberts is *Regional Economic Development: Analysis and Planning Strategy*, Springer-Verlag, Heidelberg, Germany and New York City, August 2002.

Dr. Stough's educational background includes a BS in International Trade and Economics from Ohio State University; an MA in Economic Geography from the University of South Carolina; and a Ph.D. in Geography and Environmental Engineering from Johns Hopkins University.

***TERRY CLOWER, PH.D., SENIOR PROJECT CONSULTANT  
UNIVERSITY OF NORTH TEXAS, DENTON, TX***

Terry L. Clower serves as a board member and a Senior Fellow for ACCRA and the Center for Regional Economic Competitiveness. Dr. Clower also is associate director for the Center for Economic Development and Research at the University of North Texas. The Center provides economic and public policy consulting services to clients in the private, non-profit and public sectors. For the past 13 years, Dr. Clower has conducted research and taught at the University of North Texas. Prior to joining UNT in January 1992, Dr. Clower was employed in private industry in logistics and transportation management positions.

Dr. Clower has served as project manager, staff researcher and statistical analyst on numerous projects reflecting experience in labor relations, economic and community development, public utility issues, transportation, and economic impact analyses. He serves as the Center's resident expert on telecommunications focusing on policy issues regarding infrastructure development. Drawing upon nearly a decade of experience in logistics management, Dr. Clower also leads the Center's transportation research efforts.

Examples of some of his recent projects include:

- The Economic, Fiscal, and Development Impacts of the Proposed Marvin Nichols Reservoir
- The Economic Impacts and Fiscal Costs and Benefits of the Proposed McKinney Soccer Stadium
- Economic, Fiscal, and Development Impacts of the Proposed Main Street Development Project in Downtown Dallas, Texas
- Economic and Fiscal Impacts of the Breeders' Cup World Thoroughbred Championships at Arlington Park

- Fiscal and Development Impacts of a SH 190 Corridor Commercial Area In the City of Sachse
- Planning Strategically for Regional Development in the Permian Basin
- Economic and Fiscal Impacts of a Proposed Denton County International Airport
- Economic and Fiscal Impacts of Private Land Development at DFW International Airport
- Economic Impacts of the Proposed Motor Speedway Complex in Immokalee, Florida

In one recent project, Dr. Clower critiqued a series of national research and media reports on the DFW region's technology, workforce, and business climate. He also conducted a target industry study for the Greater Dallas Chamber of Commerce and an economic impact study of the region's healthcare industry.

Dr. Clower received a B.S. in Marine Transportation from Texas A&M University in 1982, a M.S. in Applied Economics from the University of North Texas in 1992 and a Ph.D. in Information Sciences from the University of North Texas in 1997 specializing in information policy issues and the use of information resources.

***EDWARD J. FESER, PH.D., SENIOR PROJECT CONSULTANT  
ASSOCIATE PROFESSOR, UNIVERSITY OF ILLINOIS DEPT OF URBAN AND  
REGIONAL PLANNING, CHAMPAIGN, IL***

An Associate to ACCRA/the Center for Regional Economic Competitiveness, Edward Feser is an Associate Professor in the Department of Urban and Regional Planning at the University of Illinois at Champaign/Urbana, where he teaches courses in state and local economic development policy, regional development theory, urban and regional analysis, and spatial structure. Among his accomplishments includes the development and delivery of a course for economic development practitioners on cluster analysis techniques. Dr. Feser developed and delivers the course for ACCRA and CREC annually as an integral element of its *Foundations of Regional Economic Analysis* conducted in conjunction with the George Mason University School of Public Policy. He has collaborated with ACCRA/CREC on several cluster analysis projects including research for North Carolina's Eastern Region (Greenville) and the Upper Rio Grande Workforce Development Board (El Paso).

His research and writing focuses on the forces influencing the growth, decline, economic adjustment, and industrial restructuring of cities and regions. He has published work on theories of industry clustering, industry cluster analysis methods, agglomeration economies and industrial productivity, migration and regional economic distress, regional influences on process technology adoption in manufacturing, and the improvement of data and spatial-analytical techniques for local development practice. Currently he is studying economic development policy making processes and the role that universities can play in assisting states and regions undertake strategic economic development planning.

Feser serves on the Executive Council of the Southern Regional Science Association and on the editorial boards of the *Review of Regional Studies* and *Economic Development Quarterly*. His research has been supported by the National Science Foundation, the World Bank, the U.S. Economic Development Administration, the Appalachian Regional Commission, and the German Marshall Fund of the United States, as well as multiple state and local agencies. Feser is also centrally involved in the development and operation of NEURUS—the Network for European-U.S. Regional and Urban Studies—a consortium of universities in the U.S., the Netherlands, Germany and Austria.

Feser taught at the University of North Carolina at Chapel Hill for seven years prior to coming to UIUC in 2004. In 2003 he served as Assistant Secretary of the North Carolina Department of Commerce, where he acted as chief economist and senior policy advisor to the Secretary and directed the reorganization and expansion of the agency's Division of Policy, Research and Strategic Planning. He continues to work closely with state and local governments on issues related to his research and acts regularly as a consultant to the corporate sector, state and local governments, non-profit development agencies, and economic development planning firms.

***ROBERT LANN, SENIOR PROJECT CONSULTANT,  
MANAGER, RESEARCH SERVICES, GEORGIA TECH ECONOMIC DEVELOPMENT  
INSTITUTE, ATLANTA, GA***

Robert Lann is Manager of Research Services at Georgia Tech's Economic Development Institute and a Principal Research Associate. Mr. Lann has 26 years experience in economic, simulation, public policy, energy, and technology transfer research. Since 1987, he has managed a research group which contracts with public and private sector clients to perform a wide variety of research. As manager of Research Services, Mr. Lann is responsible for the quality of all research projects conducted. A state-sponsored research grant (formerly the Economic Development Research Program) provides the majority of the group's funding base and is used for internal research projects and as cost-share on state or federal sponsored research. Projects utilizing this grant cover two broad areas: fiscal and economic impact analysis and technology-based economic development. He also works with local, regional, and state agencies and economic development organizations to implement the findings and recommendations of the research.

Current research areas include fiscal impact analysis, economic impact analysis, regional economics, and technology-led economic development. He is a co-developer of the LOCI software, a nationally recognized model for economic development practitioners to use to evaluate the fiscal and economic impact of new development. His current software project is the development of a fiscal impact tool (FIT), which examines the potential impact on local government revenues and costs implied by the community's future land use plans. He is also developing a web-based fiscal impact tool (FIT) for county and city planners. From 1987 to 2000, Mr. Lann managed the Economic Development Research Program, which performed research on a variety of topics to promote the economic development of Georgia.

Examples of his research work, frequently conducted as part of a project team, include: "Enhancing the Yamacraw (GA) Cluster;" "Analysis of State Technology Programs for Use in Development of a Web-based Marketing Plan" for the Georgia Department of Industry, Trade and Tourism; "Economic Impact of the Poultry Industry on Georgia;" "Measuring the Fiscal Impact of Build-Out in Fayette County, Georgia, its Municipalities of Fayetteville, Peachtree City, and Tyrone, and the School System;" "Fiscal Impact of Residential Build-Out in Paulding County," Paulding County Chamber of Commerce; "LOCI: A Tool for Local Fiscal and Economic Impact Analysis;" and "Innovative Local Economic Development Programs," funded by the U.S. Economic Development Administration.

Mr. Lann holds a Master's degree and a Bachelor's degree in economics from the University of California at Davis and Chico State University, respectively. He received the "Outstanding Research" Award, Resource Laboratories, Georgia Tech Research Institute, Georgia Institute of Technology in 1984.

***ALFIE MEEK, PH.D., SENIOR CONSULTANT***

***COUNTY ECONOMIST AND DIRECTOR OF FORECASTING AND RESEARCH, DEPT  
OF FINANCIAL SERVICES, GWINNETT COUNTY, GEORGIA***

Alfie Meek is the County Economist and Director of the Forecasting and Research Division for Gwinnett County, Georgia. Prior to joining Gwinnett County, Mr. Meek spent three years as the Director of Applied Research at The University of Georgia's Business Outreach Services and Small Business Development Center. He has also served the State of Georgia as an economist and project director for the Center for Economic Development Services at the Georgia Institute of Technology. Preceding his tenure at Georgia Tech, Mr. Meek was the Research Economist for SunTrust Banks, Inc.

His current areas of special focus include economic impact analysis, economic forecasting and modeling, work-force issues, tax policy, and target industry analysis. An example of Dr. Meek's recent work includes an economic impact study for the Medical Center of Central Georgia and the Central Georgia Health System (CGHS) to determine the economic impact of CGHS on a seven-county region in middle-Georgia. Using specific employment, payroll, and revenue data for CGHS, in addition to a customized IMPLAN-based model of the regional economy, Dr. Meek simulated the impact both the medical center and the health system as a whole had on the region. Dr. Meek also recently completed a study of the estimated economic impact of a significant planned expansion for the Callaway Gardens resort. The study examined the one-time impacts associated with the construction of a hotel/spa and a significant residential development, as well as the operational impacts from the increased tourism and residents that would be drawn to the facility. Using specific data from the project and an IMPLAN model modified to better reflect the local economy, Dr. Meek estimated the economic impact in terms of additional employment, income, and economic output generated by the expansion.

In addition to his research, Mr. Meek speaks widely on topics relating to economic development. Frequent topics include economic impact, cost/benefit, and target industry analysis. He also designed and taught Internet for Economic Developers I and II; a series of courses attended by hundreds of economic development professionals from all parts of the United States, and from as far away as Chile.

Mr. Meek has also written for economic development-related publications, as well as other periodicals. His research on the size and economic impact of the sports industry in the United States was published in Sport Marketing Quarterly. This research into the Sports Industry has been written about in numerous publications - USA Today, Georgia Trend, Financial Times London, Fortune Magazine, and Investors Business Daily among others.

Mr. Meek is an active member of the National Association for Business Economics, and is a past president of the Atlanta Economics Club. He has also been a member of the Georgia Economic Development Association, and the American Economic Association. He earned his Ph.D. in Agricultural and Applied Economics from the University of Georgia. He also holds Master of Science and Bachelor of Science degrees in Economics from Georgia State University and the Georgia Institute of Technology, respectively.

***AL PARISH, PH.D., SENIOR PROJECT CONSULTANT***

***PROFESSOR, CHARLESTON SOUTHERN UNIVERSITY, CHARLESTON, SC***

Al Parish is a Professor of Business Administration and Economics and the Director of Graduate Studies – MBA in the School of Business and Economics at Charleston Southern University. Al is also the Director of the Center for Economic Forecasting and Chief Economist for the Charleston Metro Chamber of Commerce. Al is partly responsible for econometric and Delphi modeling of the Charleston Regional economy, publishing the quarterly economic forecasting newsletter in Charleston largest newspaper. Al has received numerous professional awards and honors and has published extensively. His specialty is regional economic forecasting. Parish's economic research and analysis are among the most widely reported tools used to help determine the health of the Grand Strand's economy.

Along with his work at Charleston Southern University, Parish is the president of Parish Economics LLC, a company that manages investment pools for pension and retirement plans and corporations. Through Parish Economics LLC, Al manages the monies raised by the Charleston Digital Corridor Foundation to capitalize the "Corridor Fund". These privately raised funds will not be invested directly in the companies seeking financial assistance from the Charleston Digital Corridor Foundation. Instead, they will be used to collateralize loans made to corridor companies by designated financial institutions. This approach allows the Foundation invest donated monies in a managed, principal protected account, while returning a reasonable rate of return for the Foundation.

Parish is also the president of Extra Help Personnel Services, a temporary staffing agency; vice president of Battery Investments, a full service investment and financial planning firm, and owner and president of AJ Davis & Co., a men's and women's clothing store. Parish serves on the board of directors for the Charleston Metro Chamber of Commerce and ACCRA.

Parish has a bachelor's degree in math and economics from the College of Charleston and a doctorate in mathematical economics from the University of North Carolina at Chapel Hill.

***STANLEY O. PROVUS, SENIOR CONSULTANT***

***COUNCIL OF DEVELOPMENT FINANCE AGENCIES, HOT SPRINGS, AR***

Stan Provus is the President of Stanley Provus and Associates, Inc. and also serves as the Director of Training for the Council of Development Finance Agencies (CDFA). Over 25 years highly successful experience leading, designing and managing effective economic development institutions and programs in urban and rural areas. Mr. Provus has successful hands-on expertise in many major aspects of economic development, from entrepreneurial development and industry attraction to domestic and international finance for businesses, housing and infrastructure to project-based real estate planning and development to strategic planning. He has also held prior positions and consulting assignments with organizations in Illinois, Washington, Maine, DC, Oklahoma, Oregon, Nevada, Arkansas, Florida and Africa.

Mr. Provus is the recipient of distinguished service awards from the states of Maine and Oklahoma, and has served on the boards of numerous national, state, and local public/private development organizations. He has also made frequent presentations to national audiences on economic and development finance techniques and practices. Since 1992, he has been the owner of a successful consulting company specializing in assisting states, public agencies, and trade associations on the design, operation and evaluation of development lending and investment programs, and business services.

***WILLIAM RIALI, PH.D., SENIOR PROJECT CONSULTANT,  
RESEARCH ASSOCIATE, GEORGIA TECH UNIVERSITY ECONOMIC DEVELOPMENT  
INSTITUTE, ATLANTA, GA***

William Riall is a Principal Research Associate at Georgia Tech's Economic Development Institute. He has been practicing applied economics for 25 years. Current areas of interest include economic and fiscal impact analysis at the state and local level, economic development strategies, economic and feasibility analysis of development and technological opportunities, and software development. Dr. Riall's accomplishments include co-development of a nationally recognized local fiscal impact analysis software tool (LOCI) as well as a long history of economic and fiscal impact analyses of projects in a wide variety of settings. Analyses have been conducted from state, local, national or international perspectives spanning many types including fiscal impact, financial feasibility, economic impact, and cost-benefit. He also has developed a fiscal impact analysis model for Georgia (state-level) with results from numerous projects reviewed at the highest level of government and continues to refine and further develop approaches that provide decision-makers with timely and insightful analyses for complex economic and policy questions.

Dr. Riall conducted an economic impact of a Federal Law Enforcement Training Center (FLETC) to be located in Brunswick, GA. The analysis examined impacts on a five-county area. The FLETC project analysis was somewhat complex in that it included numerous local contracts in diverse industries, an active tourism component, significant construction, and many sources of funds for various purposes. The analysis used IMPLAN® to estimate the multiplier effects and other data sources (for example, Longwoods International tourism expenditure data) to derive the estimates.

Dr. Riall also collaborated with Alfie Meek to utilize a fiscal impact tool (FIT) for land use planners. The FIT was used to estimate the fiscal impact of a long-run or full build-out land use plan on the county government, the municipalities within the county, and the county school system. FIT also is used to analyze the fiscal impact of near-term mixed-use projects and annexations.

Dr. Riall holds a Ph.D. in economics from Georgia State University, an MBA from the University of Alabama, and a B.S. degree in chemistry from the University of Alabama.

***TOBY RITTNER, EXECUTIVE DIRECTOR  
COUNCIL OF DEVELOPMENT FINANCE AGENCIES, CLEVELAND, OH***

Toby J. Rittner was named Executive Director of the Council of Development Finance Agencies (CDFA) in 2004. CDFA is a national association dedicated to the advancement of development finance concerns and interests. CDFA is comprised of the nation's leading and most knowledgeable members of the development finance community representing public, private and non-profit entities alike. Mr. Rittner runs the day-to-day operations of the organization, which includes management of a 32 member Board of Directors, and the organization's various initiatives.

Prior to joining CDFA, Mr. Rittner was the Director of Legislative Affairs and former Director of Training for the International Economic Development Council (IEDC). IEDC is the nation's largest membership organization dedicated to the advanced of the economic development profession. In his various capacities with IEDC Mr. Rittner conducted numerous technical assistance projects for state and local governments in the area of development finance. Mr. Rittner has also worked for the Franklin County, Ohio Board of Commissioners, Community and Economic Development Department as a Senior Program Coordinator for Economic Development and as an Associate Planner for the City of Gahanna, Ohio.

Mr. Rittner has a Bachelor of Arts in Political Science and a Master of City and Region Planning degree from the Ohio State University. He is a Certified Economic Development Finance Professional (EDFP) through the National Development Council (NDC).

***KEITH SCHWER, PH.D., SENIOR PROJECT CONSULTANT,  
UNIVERSITY OF NEVADA AT LAS VEGAS, LAS VEGAS, NV***

Keith Schwer is Director of the Center for Business and Economic Research and is also a full professor at the University of Nevada, Las Vegas. He currently teaches undergraduate and graduate courses in economics and finance. He previously worked as the Head of the Division of Business and Management at Norwich University.

Dr. Schwer's most recent engagements include Moderator for NTS Development Corporation for a Technology Assessment and Planning Workshop, Labor Force Technical Advisory Committee for the Annie E. Casey Foundation, and he was a participant in the Summit on Economic Revitalization in Las Vegas, Nevada. Other recent consulting engagements include the Nevada International Industrial Air Center Project, Economic Impact of Water Shortages for William T. Whites Associates, and facilitation at the Western States Economic Outlook conference.

His recent project include developing long-term population projections for Clark County, Nevada using REMI as part of a water and transportation planning project for the Southern Nevada Water Authority, Clark County Comprehensive Planning, and the Regional Transportation Commission of Southern Nevada (RTC). He also conducted an economic impact analysis of the Yucca Mountain Nuclear Waste Repository on the Economy of Nevada. He also completed an impact study of Nevada's renewable energy resources.

Mr. Schwer holds a Ph.D. in economics from the University of Maryland, a M.A. in economics from the University of Oklahoma, and a B.B.A. in statistics from the University of Oklahoma.

***TOM TANNER, PH.D., SENIOR PROJECT CONSULTANT,  
RESEARCH ASSOCIATE, UNIVERSITY OF GEORGIA CARL VINSON INSTITUTE OF  
GOVERNMENT, ATHENS, GA***

Tom Tanner is a consulting economist to the Center for Regional Economic Competitiveness and a staff economist for the University of Georgia's Carl Vinson Institute of Government. Dr. Tanner specializes in impact analysis and economic modeling of the indirect and induced impacts of changes in public policy, improvements to transportation and other infrastructure, existing and proposed business ventures, and the economic impact of proposed and existing government programs. He also has experience conducting client-based, applied economics research on the statewide and regional impacts of tax policy, economic development initiatives, transportation projects, environmental and energy policy, health care, and tourism.

Dr. Tanner joined the Carl Vinson Institute of Government as an Economist in August, 2001. He is currently designing and developing the Georgia Economic Modeling System, an econometric modeling and forecasting tool for the state of Georgia and local communities within the state. He has designed and executed economic impact analysis of a variety of state government programs and initiatives, including the Georgia State Lottery, the Georgia Power Alley Initiative, and the Metropolitan Atlanta Regional Transportation Authority. Dr. Tanner recently completed an occupational forecast demand project for Athens Technical College to be used in enrollment forecasts and program refinements.

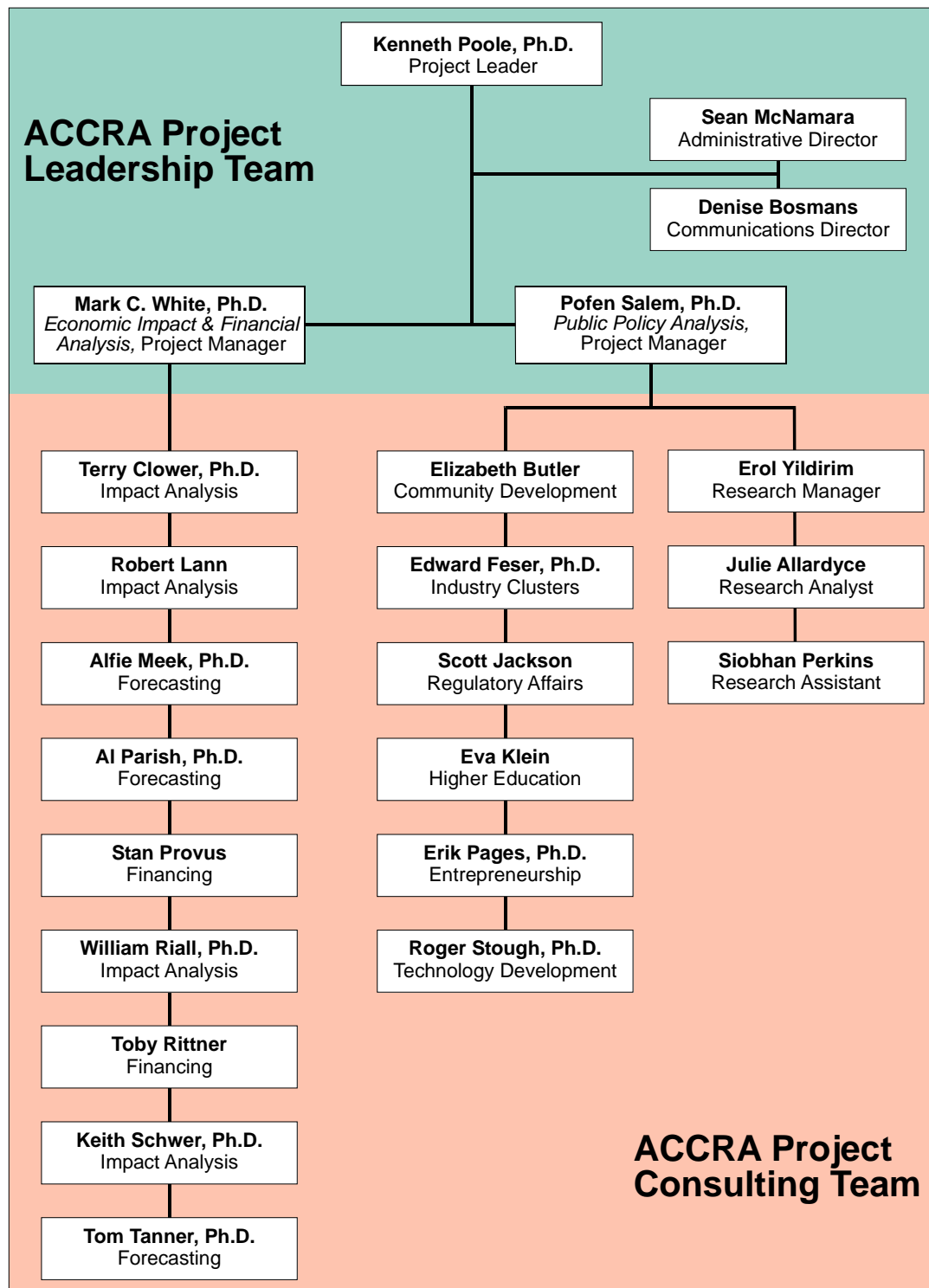
Dr. Tanner conducted an economic impact analysis of the proposed Certified Capital Company (CAPCO) program for the state of Georgia, commissioned by Growth Capital Alliance. Previously, Mr. Tanner had conducted similar CAPCO project analyses in Arizona, Colorado, Michigan, Florida, Missouri, Wisconsin, Texas and elsewhere. He also studied the impact of the Metropolitan Atlanta Rapid Transit Authority (MARTA) on the Atlanta region. Dr. Tanner has also conducted a series of economic impact assessments for the Georgia Department of Industry Trade and Tourism including the impact of an automotive assembly plant on the Savannah region as well as the impact of a representative major motion picture shoot in the state.

Before moving to Georgia, Dr. Tanner was a senior consultant and economic analyst for Regional Economic Models Inc. (REMI) in Amherst, Massachusetts. At REMI, he designed the prototype for the only Internet-based regional economic modeling system (e-REMI), using HTML, JavaScript, and VB script. He also developed a spreadsheet system to assist in translating transportation savings into overall (direct, indirect and induced) economic impacts. As part of that assignment, Dr. Tanner advised clients on computer modeling of the economic impact of transportation projects, tax policy changes, business attraction, retention, and expansion, and environmental and alternative energy issues. He also conducted one-day and two-day economic modeling seminars throughout the United States.

Dr. Tanner was also an Economics instructor at the University of Wisconsin at Superior (UW-S) and served as a research associate at the UW-S Center for Economic Development where he designed research instruments, supervised data collection, conducted statistical analysis, and prepared reports for over 15 economic analysis projects. During his tenure, he developed an economic modeling system widely used for industrial targeting by communities in Northern Wisconsin. He also served as a macroeconomics teaching assistant at Iowa State University and a research assistant for the Center for Agricultural and Rural Development.

Dr. Tanner earned his Ph.D. in Economics at the University of Georgia, his Bachelor of Science in Economics and Philosophy at Willamette University and his Master of Science in Economics at Iowa State University. His Ph.D. specialized in public and labor economics, economic geography, and econometrics.

## ACCRA Project Team Organizational Chart



## **Methodology and Approach**

This proposed effort is based on the assumption that ACCRA's services would be used "as needed, if needed." In such a context, it is impossible to specify exactly the methodology and approach utilized. Therefore, ACCRA has identified four sample projects and reviewed the methodology and approach used in those efforts. Two of the cases represent projects that ACCRA has implemented for the Arizona Department of Commerce. In each case, ACCRA customized the methodology and approach for the research effort.

ACCRA's philosophy in implementing these efforts is to discuss the proposed research or policy analysis need and the budget available. The goal is to match the need and resources to ensure that the client receives a valuable deliverable that can help frame his or her policy decisions.

ACCRA's emphasis in each of these cases is to engage the client and other stakeholders as appropriate in the research and analysis effort in such a way that the recommendations that emerge come from a collaborative discussion. It is rarely in the client's best interest to simply have ACCRA conduct a research project and make recommendations. Instead, the development of policy is a process so the policy maker should be directly involved in the research and analysis process. ACCRA examines the data and shares with the client, develops policy options with the client, and then refines its recommendations based on options that the client view are feasible and implementable.

In the following section, ACCRA provides four examples of projects implemented, how we approached those projects, and the methodology employed in conducting the research and analysis.

### ***Methodology and Approach Used for Selected ACCRA Projects***

#### ***Benchmarking the Arizona Commerce and Economic Development Commission, 2004, Arizona Department of Commerce, Phoenix, AZ (<http://www.azcommerce.com/prop/eir/addreports.asp>)***

The goal of this project was to provide guidance for the Arizona Commerce and Economic Development Commission in refining its investment plan and its governance structure. As part of this effort, ACCRA gathered data for Arizona and 18 competitor states on economic development budgets, state agency governance structures, and business incentive programs. This information was gathered from both primary and secondary sources, including web sites, agency reports, and interviews with key personnel.

To gather information on state economic development budgets, ACCRA surveyed state economic development policy and research offices about their investments that year. The survey was conducted both by mail and email as well as by telephone. ACCRA achieved a very high response rate by conducting extensive telephone follow-ups.

In many cases, the policy and research office responded or they helped to gather data from budget officers within the respective agencies. For states not responding to the survey, ACCRA reviewed approved budgets for the agencies to determine budgeted expenditures. In cases in which ACCRA had questions about the approved budget, the consultants submitted the completed survey to agency staff for review and comment.

As for the analysis of the economic development governance structure in competitor states, ACCRA staff first conducted extensive reviews of agency websites to gain as much information as possible about the structure and staffing. ACCRA staff, then, conducted 12 45- to 75-minute telephone interviews with the staff director or chief policy person for each of the agencies that had governing boards that might be comparable to Arizona's Commerce and Economic Development Commission. ACCRA developed and used a standardized interview protocol to provide structure in gathering the most relevant data.

In addition, ACCRA gathered incentives data for each of the 18 competitor states and Arizona by starting with a set of several previously published incentive directories. Many of those directories were out-of-date so ACCRA then developed its own web-based database structure to manage several hundred incentive program profiles. For each business incentive, ACCRA gathered information about the incentive program's purpose, goals, activities, eligibility requirements, and application information (wherever available). ACCRA then classified the incentives based on several variables, including the status of the program (whether or not it is active), the program category (whether it provides direct financing, indirect financing, or grants to businesses), the type of program (whether it is a bond, a revolving loan, a grant, a loan guarantee, or one of several forms of tax-related incentives), the geographic focus of the program (whether or not it is targeted to a rural area, zone, redevelopment area, etc.) and the policy goal that the program was intended to address. This database served as the basis for the analysis of business incentive programs.

Based on a comparison of Arizona with peer states, ACCRA proposed a significant expansion in the State's investment in economic development. The proposed increased investment would help to ensure that Arizona remains competitive. ACCRA also offered several alternatives for governing the agency. Arizona DOC leadership plans to use the study findings in their FY 2007 budget proposal as the state legislature debates the agency's future.

***Durham Workforce Development Strategy, 2004-2005, Durham Workforce Development Board, Durham, NC***  
***([http://www.ci.durham.nc.us/departments/eed/pdf/workforce\\_dev\\_plan.pdf](http://www.ci.durham.nc.us/departments/eed/pdf/workforce_dev_plan.pdf))***

In July 2004, the Durham Workforce Development Board engaged ACCRA/CREC to assess the Board's investments and review its strategic vision from an economic as well as workforce development perspective. This project involved two components: (1) assess the workforce challenges facing both Durham County and the WDB, and (2) prepare recommendations to guide the Board in better fulfilling its mission.

The first component required ACCRA/CREC to analyze demographic and economic data in order to provide context for the challenges facing Durham County and the Workforce Development Board. This involved collecting existing data and anecdotal evidence through published data sources and interviews with local stakeholders, including companies, training and educational program managers, policy makers, and service providers. Stakeholder interviews included focus group sessions with citizens, businesspersons, academic officials, and government leaders. In addition ACCRA/CREC conducted one-on-one interviews with major corporate and government leaders. These data allowed CREC to identify where industry needed workers and the available skills currently within Durham's workforce.

The second component required examination of the existing job training and placement programs to gauge the extent to which they are meeting the county's needs. This analysis, combined with examining the wider workforce system, allowed ACCRA/CREC to identify several strategic issues that will shape Durham's future workforce. Based on the results of this assessment, ACCRA/CREC facilitated several discussion sessions with the Workforce Development Board, helping to develop a set of recommendations that addressed their most important priorities.

***Arizona Construction Trades Labor Study, 2004-2005, Arizona Department of Commerce, Phoenix, AZ***  
***(<http://www.azcommerce.com/prop/eir/addreports.asp>)***

The study was conducted in response to concerns from state leaders about the perceived shortage of construction workers and the impact that this shortage may have on the industry's ability to meet growing residential and commercial demand for construction. The study documented the industry's status, its workforce needs, and its capacity to find or prepare skilled workers.

The first part of the analysis examined the industry and its occupational needs based on existing data. This section described the industry and its scope, documents its concentration in the state's urban centers, provided data about wages and occupational opportunities, and depicted the path that construction workers might take in building a successful career in the industry.

The second part provided a glimpse of the views of company owners. ACCRA conducted a survey of construction trades firms in the late summer and early fall of 2004. The survey provided insights into the hiring practices of construction firms, their commitment to apprenticeships and other forms of training, and the views of firm owners about the challenges that the industry faces.

The third part identified the training capacity to address those needs and reveals certain gaps in the system. Based on interviews with training providers, this section described the availability of training and describes the perceptions of trainers who provide services to construction workers and firms, revealing their perspectives on the key issues facing the industry.

The last part of this effort synthesized the findings from the research and offered suggestions on what might be done to address those gaps. ACCRA reviewed the key findings from the research and presents a series of actions recommended to take advantage of opportunities available to the construction trades in Arizona or addresses the basic challenges facing the industry.

***Future Forward Regional Economic Strategy, 2002-2004, Western Piedmont Council of Governments, Hickory, NC***  
***([www.future-forward.net/reports.htm](http://www.future-forward.net/reports.htm))***

ACCRA/CREC served as the lead consultant for a national team involved in developing a comprehensive strategy for a 12-county region in western North Carolina. The project, championed by then-US Congressman Cass Ballenger, examined the economic and cultural challenges facing a predominantly rural area of 800,000 people. The area has traditionally been highly dependent on employment in vulnerable manufacturing sectors, including textiles, apparel, furniture, and fiber optic cable. The

project included researchers from Eva Klein & Associates, the University of North Carolina at Charlotte, and the Hudson Institute. The team conducted extensive data demographic and economic analysis of the region. ACCRA/CREC also supplemented this description with a detailed assessment of the region's industry sectors. We compared the region's industry employment and wages to larger state and national benchmarks in order to provide evidence of economic performance in the region. Using common regional analysis techniques, such as shift-share and location quotient analysis, ACCRA/CREC illustrated relative industry concentration and identified the region's comparative advantage among economic sectors.

From this analysis, we also identified important industry segments and conducted an in-depth regional cluster analysis. The end result of these related quantitative data analyses was the identification of a set of key clusters that could potentially thrive in the region with proper public policy action. By understanding the occupations of workers in these sectors, the data also provided critical intelligence for later discussions of education and workforce development initiatives.

In addition, the project team worked with the Future Forward Strategic Planning Committee to determine key persons in the region who represent business, industry, government, academia, and community stakeholder organizations. These individuals participated in a series of individual and focus group interviews. ACCRA/CREC conducted more than 150 one-on-one and small group interviews, a series of 10 sub-regional workshops involving more than 400 local leaders, and a series of decision-support meetings with a Strategic Planning Committee. Once completed, each of the 12 county commissions adopted a resolution of support for the strategy, and the fiscally hard-hit counties have committed to providing on-going funding for the effort.

### ***Impact of Manufacturing on the US and State Economies, 2003-2004, US National Institute of Standards & Technology, Manufacturing Extension Partnership Program, Gaithersburg, MD***

ACCRA conducted an impact study focusing first on the impact of manufacturing on the economies of the US and several states and then the impact of MEP on those respective states. ACCRA tapped its network of research associates and members to develop the research program. ACCRA staff facilitated a collaboration between researchers at NIST MEP program and state stakeholders. ACCRA's role included resolving research design conflicts and building partnerships among researchers at different organizations.

Once the research design was agreed upon, ACCRA worked closely with the researchers to run the analysis, using a standardized REMI modeling protocol. One of the key goals of this effort was to establish an on-going regional research collaboration involving NIST MEP and the several states.

### ***Proposed Method for Responding to RFP Requirements***

ACCRA provides a national perspective in its research efforts. Our membership spans 45 states, and our research involves working with allies, partners, and consultants across the nation. As demonstrated in the examples provided above, ACCRA has conducted a wide array of studies, including economic impact analysis, strategic planning and policy development. Our areas of specialization include economic development, community development, workforce preparation, and increasingly higher education. Since

the specific program of work is not defined in the RFP, ACCRA has assembled a team of nationally known regional economists, strategic planning specialists, and policy analysts to assist in responding to a variety of potential research and consulting needs.

The RFP requests information about ACCRA's proposed method for respond to the RFP. In general, the ACCRA project leader will talk with the requesting agency to review the needs and concerns as well as help in determining how well ACCRA's experience and expertise can help in meeting those needs. Moreover, our philosophy is to work collaboratively with our clients. This may mean jointly developing an appropriate scope of work at the beginning of the project and working with the client to ensure that the research and facilitation activities are indeed providing the needed response.

Following is an outline of a general methodology and approach typically used in helping to refine critical research questions and generating answers to common public policy questions related to our general policy domains. Of course, the actual scope of services and project activities would be customized to respond to the needs of the requesting agency and the specific project.

### ***Phase I: Project Planning and Management***

#### ***Conduct initial project kick-off meeting***

The leaders of the ACCRA Project Team would meet with representatives from Arizona's requesting agency to discuss the project and review the full work program and research needs in much greater detail. In some cases, this meeting can be done by video or teleconference as a way to manage budget resources. Based on input received during the initial project meeting, the project team leader would revise the scope of work to reflect key concerns and ensure all appropriate goals are accomplished within the proposed project timeframe and budget.

#### ***Identify and clarify most pertinent research issues***

During this initial meeting, the State's project representative and the ACCRA team will start the process of identifying the most pertinent issues and responding to the information that the requesting agency requires for implementing successful research activities. The goal is to ensure that the research and policy questions are clearly defined and all parties agree on the key issues and likely data or analytic challenges.

#### ***Provide periodic progress reports***

ACCRA will plan to meet in person or by conference call with key agency staff to provide on-going updates of research progress and to coordinate communications with internal and external consumers of the research. To ensure high quality research and on-time performance, ACCRA will also discuss technical challenges and solutions as they arise during the proposed research and analysis. The goal is to ensure that the policy questions of greatest concern to the Department are indeed addressed during the course of research design and implementation.

## ***Phase II: Data Collection and Research***

### ***Review data, prior studies, and current initiatives***

ACCRA would commence the actual work plan by reviewing and analyzing existing reports and related analyses. The goal of this exercise is to avoid duplication and build on previous work. The project team would prepare an annotated summary of appropriate research findings, recommendations, and implications for potential action. This summary would be integrated into our final report as appropriate.

### ***Gather secondary data***

The first step of any detailed data analysis – whether it is an impact analysis or policy research project—is to identify relevant secondary data sources. These data frequently include quantitative socioeconomic information about the state and its counties as well as competitor or peer states. ACCRA will gather this information—by first exploiting available federal and state public data sources and then utilizing fee-for-service proprietary datasets.

### ***Conduct surveys, interviews, or focus groups to validate secondary data***

Depending on the project resources and research needs, the data gathering efforts may need to be extended to include obtaining necessary data through primary data collection, including surveys, interviews or conducting focus groups with key stakeholders. ACCRA will work with the requesting agency to determine the most appropriate strategies for gathering additional information about insights and perspectives of key stakeholders. This data gathering technique can be critical in validating secondary data as well as providing context on information previously gathered. ACCRA would prepare a standardized protocol – appropriate to the survey, interview or focus group – to ensure that information gathered is structured and comparable. The goal in this data gathering process is to identify trends and patterns and to help analysts interpret secondary and other primary data.

## ***Phase III: Conduct Data Analysis***

### ***Apply adequate statistical methods for data analysis***

ACCRA will apply appropriate statistical tools to analyze available data. For survey research, ACCRA will tabulate the data and identify correlated variables. In some cases, a regression analysis may also be appropriate. For economic or fiscal impact studies, ACCRA would use commercially available software (including REMI, IMPLAN, ReDyn and/or LOCI) to analyze input data.

### ***Develop findings and conclusions***

ACCRA will analyze and integrate all primary and secondary data to identify key findings and issues. The goal of this exercise is to describe each of the issues and to organize them into categories of related challenges. The findings and issues become the outline for recommendations to the client agency.

*Review the findings and conclusions with client staff*

ACCRA firmly believes that findings and recommendations must be developed in collaboration with the client. The client has its own perceptions and interpretations of what the data means. Understanding these perceptions and interpretations is critical in developing feasible and implementable recommendations. ACCRA would plan a meeting and/or teleconference to review the findings and recommendations to ensure that they reflect the realities of the unique Arizona political climate.

***Phase IV: Presentation of Findings***

*Develop recommendations and conclusions*

ACCRA will synthesize the findings and conclusions from the previous three phases so as to make recommendations and suggestions to the requesting agency. The recommendations will include feedback developed in earlier phases of the project as well as any input provided by other document reviewers.

*Present findings and recommendations*

ACCRA also proposes to present the findings and recommendations to key policy makers and stakeholders. The goal of this exercise is twofold: to share our research and findings and to gain input (and buy-in) from those stakeholders. In past presentations, ACCRA typically provides a brief overview of the report and our proposed recommendations. We make this presentation in a format that encourages feedback and debate. The discussion frequently influences our final recommendations and conclusions.

*Finalize report for the agency*

Comments from the requesting agency as well as feedback from stakeholders are then integrated into a final version of the report. ACCRA will also refine the presentation made earlier to reflect these changes and share the presentation with the agency to utilize for their own purposes in presenting the report's findings and recommendations to legislators or other stakeholders. ACCRA will consult with the agency on the final form and delivery as the project progresses.

## Project Cost

Following is a summary of the consulting rates. The pricing sheet includes the rate for the project leader. Below includes detailed rates for all key staff and project consultants.

### Consultant Billing Rates

ACCRA Key Staff	Hourly Billing Rate
K. POOLE, PROJECT LEADER	\$195.00
P. SALEM	\$115.00
M. WHITE	\$95.00
E. YILDIRIM	\$95.00
J. ALLARDYCE	\$65.00
S. PERKINS	\$50.00
S. McNAMARA	\$100.00
D. BOSMANS	\$100.00
ACCRA Senior Consulting Associates	Hourly Billing Rate
<i>Public Policy Consultants</i>	
E. BUTLER, ACCRA/CREC	\$95.00
S. JACKSON, ACCRA/GMU	\$90.00
E. KLEIN, EVA KLEIN ASSOCIATES	\$300.00
E. PAGES, ENTREWORKS	\$200.00
R. STOUGH, GMU	\$250.00
<i>Economic Impact &amp; Financial Analysis Consultants</i>	
T. CLOWER, U. OF NORTH TEXAS	\$300.00
E. FESER, U. OF ILLINOIS	\$175.00
R. LANN, GA TECH	\$175.00
A. MEEK, GWINNETT CO., GA	\$220.00
A. PARISH, CHARLESTON SOUTHERN U.	\$175.00
S. PROVUS, COUNCIL OF DEV FINANCE AGENCIES	\$200.00
W. RIAL, GA TECH	\$140.00
T. RITTNER, COUNCIL OF DEV FINANCE AGENCIES	\$140.00
K. SCHWER, U. OF NEVADA AT LAS VEGAS	\$175.00
T. TANNER, U. OF GEORGIA	\$150.00

### Direct Cost

ACCRA will request reimbursements for direct costs associated with travel and other expenses, including the purchase of proprietary economic analysis software and related

economic data. For in-state travel, ACCRA will utilize the state per diem rates as prescribed in the proposed scope of work. ACCRA assumes that the State of Arizona will issue identifications for consultants to ensure that they are eligible for state government-negotiated hotel rates. In addition, ACCRA will request direct reimbursements for expenses with no added administrative fee. Any reimbursement requests would be approved in advance by the contracting agency's representative.

### ***Terms and Conditions***

Payment for services will be monthly based on an invoice of actual expenditures incurred. Payment is expected within 30 days of invoice. As a standard policy with all new client agencies, CREC an initial deposit of 20 percent of the total project costs upon contract approval before work begins. The balance due from approved and invoiced work will be deducted from the initial deposit until it has been exhausted. Monthly invoice statements will report all credits. This deposit requirement would not apply to the Arizona Department of Commerce as it has prior contracts with ACCRA and an established payment history.